



COBISS3 Loan

V6.24-00

User Manual



United Nations
Educational, Scientific and
Cultural Organization

Regional Centre for
Library Information Systems and
Current Research Information Systems
Regionalni center za knjižnične
informatijske sisteme in informacijske
sisteme o raziskovalni dejavnosti



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The manual includes all updates from the first published printed version of the manual in November 2007 until the present day. The contents of the manual **partly** correspond to the V6.24-00 version of COBISS3 software, and are also valid for all future software versions until they are withdrawn or another electronic version is published.

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PREFACE

COBISS3 is the name for the third generation of software, developed by IZUM for the needs of the COBISS system. The first generation of software was named ATCLASS; this was followed by the second one which shared the name of the COBISS system (now called COBISS2), while the latest generation, developed on the basis of object technology, is called COBISS3.

With a new concept, new tools were included into the COBISS3 software development process, such as tools for object analysis, design, and implementation and configuration management.

One of the architectural characteristics of the COBISS3 software is the three-tier concept: user interface, business logic and database. All three layers are connected through the RMI object model (Remote Method Invocation); Oracle is used for databases.

The COBISS3 software is developed in Java, which is more than just a programming language, since it enables the application to work in different environments:

- user interface (Windows 98/Windows 7/ME/2000/XP/Vista, Linux, Mac)
- business logic (Windows 2000/XP, Linux)
- database (Windows 2000/XP, Linux)

The COBISS3 software consists of nine modules:

- COBISS3/Cataloguing
- COBISS3/Acquisitions
- COBISS3/Serials
- COBISS3/Electronic Resources
- COBISS3/Holdings
- COBISS3/Loan
- COBISS3/Interlibrary Loan
- COBISS3/Reports
- COBISS3/Application Administration

COBISS3/Cataloguing is the central module of the COBISS3 software; it supports shared cataloguing within the Co-Operative Online Bibliographic System and Services (COBISS). It enables the following procedures when

working with bibliographic and authority records in different databases: searching and viewing records, creating and editing records, downloading records from the COBIB database and different foreign databases, resolving duplicate records, resolving local bibliographic records and splitting authority records. Both cataloguing and working with authority records take place in a single cataloguing user interface.

COBISS3/Acquisitions is a module which enables libraries the automation of the following procedures for acquiring monographs: purchase (consisting of pre-order selection, order and prepayment of items ordered, receipt of items ordered and payment of items received), receipt and shipment of monographs based on exchange, receipt of legal deposit copies and gifts, keeping records of other types of library material acquisition, claims for undelivered and received material, received invoices and documents for prepayment, partner data maintenance, fund data maintenance and counter set-up.

COBISS3/Serials is a module which enables the automation of the following procedures for acquiring serials: purchase (consisting of pre-order selection, order, order cancellation, prepayment and payment of serials), receipt and shipment of serials based on exchange, legal deposit copy or gifts along with other types of library acquisition, maintenance of publication pattern data and performance of serials check-ins, sending publications in exchange and sending legal deposit material, claims for missing issues, prepayment documents and received invoices, partner data maintenance, fund data maintenance and counter set-up.

COBISS3/Electronic Resources is a module which enables libraries the automation of the following procedures for acquiring electronic resources: purchasing packages and licences for individual electronic resources, prepayment and payment of electronic resources, receipt of legal deposit of electronic publications, links to e-book loan portals, partner data maintenance and fund data maintenance as well as counter set-up.

COBISS3/Holdings is a module which enables the following actions: adding fields 996/997 and 998, entering and changing data in these fields, copying data to fields 996/997, changing the status in several fields 996/997 within the record, changing the data in fields 996/997 using accession numbers or loan numbers, sorting fields 996/997 within the record, making up a set, printing labels, accessioning monographs, de-accessioning missing monograph copies after inventory. Management of serial holdings data allows you to accession serials, create and edit publication patterns, perform serials check-in based on publication patterns, and also provides support with binding, unbinding and de-accessioning issues and volumes of serials. The module includes also the following procedures: creating parallel local records in the local database, transferring fields 996/997 from one bibliographic record to another, displaying records in the COMARC format, checking the loan status of copies, printing the list of recently received materials, setting up counters for adding accession numbers, running numbers and loan numbers as well as displaying the list of libraries, updating material data with multimedia, and checking and selecting discarded library material.

COBISS3/Loan is a module which enables libraries the automation of the following procedures: entering and editing data on library members, deleting data on library members, changing library membership card numbers and

printing library membership card labels, lending materials for outside loan or for reading room loan, renewing loan periods, changing due dates, returning material with or without the option of selecting library members, reserving available and currently unavailable material, returning material with restriction, recording the loss of material, printing lending forms and transferring data from the reference students database. For serials, you can specify routing lists and record routing of individual issues of serials. In libraries in which loan is organized in separate departments it is possible to keep separate loan records by department, to put material on interdepartmental loan from the parent department to the host department, to lend that material further to members in the host department, to return material in any department and search for material in the catalogue by departments. For the needs of loan systems, a note about the copy (item) can be added for individual copies (items) of material; for material on loan, temporary notes can be entered as well. In the local catalogue, you can perform searches for individual items of material, view bibliographic and holdings data and, if the item is not available, provide the information about who borrowed the material if it is not currently available. It is possible to use different criteria to search for data on library members, and then print out the search results as a list. Libraries that charge their members for specific services can also manage their price lists, record and settle debts, print invoices, cancel debt settlement, close out cash register and view cash register transactions. For members with delays in returning library material, libraries can create and print out overdue notices. Libraries can also change the contents of overdue notice forms, time parameters for loans, the opening days calendar, the settings for the electronic notification of library members; they can set the restricted number of material on loan, the restricted number of loan renewals and the membership validity period for individual member category, and change the URL address with contact details and notifications related to the My library service in COBISS/OPAC. It is now also possible for libraries to perform automated loan procedures in the mobile library and use the RFID self-checkout and RFID reader at the lending desk.

COBISS3/Interlibrary Loan is a module which includes the following procedures: recording customer requests for ILL, reservation of home library materials, ordering materials from suppliers or the library's closed stacks, recording the receipt of material to the customer, recording the receipt of materials from suppliers or the library's closed stacks, delivery of materials to the customer, return of materials from the customer and return of materials to the supplier or the library's closed stacks. It also includes preparation and submission of invoices for legal entities, i.e. partners who order or pay for the services provided, preparation of messages for customers and suppliers, partner data maintenance and price lists as well as counter set-up.

COBISS3/Reports is a module which allows you to create multiple types of reports, such as different forms, business documents, statistics, etc. Reports are created on the basis of data from all the COBISS3 software modules and can be printed out or sent by e-mail when they are ready. The standard-form reports for each module are designed at IZUM.

COBISS3/Application Administration is a module which allows libraries to maintain data on their home library and partners and to view data on system users.

The contents of the manual correspond to the currently valid version of COBISS3 software, and are also valid for all future software versions until they are withdrawn or another electronic version is published. The contents of the manual are saved on the **Training** portal and available by selecting *E-manuals*, you can also access the contents directly by going to the **Help** menu within the COBISS3 software.

For better understanding of software functioning, a glossary of the used expressions is included in the COBISS3 Basic Guidelines User Manual.

Further information and help is available at the seat of the National COBISS Centre in your country (contact details published on the last page of the manual).

ABOUT THE MANUAL

Writing conventions used in this manual:

1. Text in bold indicates the names of windows, tabs and buttons.



Examples:

The **Order** editor opens.

The **Order cancellation** window opens.

Click on **Details** tab.

Click the **Select** button.

2. The names of menus and methods in the menu bar are printed in bold. The name of the menu is always followed by the name of the method. Names of classes are also printed in bold.



Examples:

Select the **Order** class.

Select the **Class / New Object** method.

3. Those parts of the text which have to be emphasised are written in bold italics.




Example:

The ***destination*** can be an e-mail address or a printer.

4. Icons are displayed graphically.



Example:

Click on the icon  .

5. Names of attributes and drop-down lists are indicated with double inverted commas.



Example:

Under "Hit list format", select the format, in which you wish the search results to be displayed.

6. Attribute values are displayed in italics.



Example:

If a customer would like to buy a copy of an article, select the value *purchase* under "Service type", the value *article* under "Type of material" and *copy* under "Medium type".

7. The keys on the keyboard are enclosed in angle brackets.



Examples:

<Enter>, <Tab>, <Shift>, <Ctrl>, <Alt>, <Esc>.

8. A plus sign (+) between two key names indicates that both keys have to be pressed simultaneously.



Example:

<Ctrl> + <P> require you to press <Ctrl> and <P> at the same time. Press <Ctrl> first and hold it down, then press <P>.

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
- interdepartmental 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.

2 SETTING UP PARAMETERS

Within the COBISS3/Loan software module, you can set up the following parameters in the library:

- loan related time parameters for different types of material
- calendar with a list of non-work days in the library
- parameters for electronic notification of library members
- web page address where contact details and notifications related to the My Library service in COBISS/OPAC are published
- restriction for some member categories or some types of material (restrictions on operations)

To set up the loan parameters, use different methods within the **Home library** class. In libraries in which loan is organised in separate departments it is possible to set up different time parameters and a calendar for each department.



Note:

*To set up the parameters, the following privilege: LOAN_EDT – Changing loan parameters is required. If you do not have this privilege, you can see the parameter settings by using the **Show loan parameters** method in the **Home library** class or on the **Department** object. If a calendar or time parameters for individual departments are not set up, a notification will be displayed.*

Subchapters:

- Time parameters
- Calendar
- Loan type (pq table)
- Electronic notification
- Contact details and information for COBISS/OPAC
- Restrictions on operations

2.1 TIME PARAMETERS

The data on time parameters for loan is maintained with the **Home library / Time parameters** method.



Note:

Initial parameter settings for "Loan period" are entered by the national COBISS centre on the basis of the table of time parameters defined by the library in Loan minutes in chapter 3.3. Upon the library's request, the NCC can change the value of this parameter, so that the loan will be disabled ("0d" or blank).

If departments do not have the same time parameters in the library in which loan is organised in separate departments, define the time parameters separately for each department. Find and select the department in the **Departments** class and then use the **Object / Time parameters** method.

The **Time parameters** window will open, showing for which department (e.g. *Department 01*) the time parameters are valid, when and who created the table for the first time and who modified the table last.

Once you click the **Table** button, the **Time parameters table** window will open. The rows in the table represent the type of material, while the columns represent the following time parameters:

borr. – loan period for outside loan for copies that do not have special loan restriction in the subfields 996/997p, 996/997u or a special status in subfield 996/997q

ren. – renewal period for copies that do not have special loan restriction in the subfields 996/997p, 996/997u or a special status in subfield 996/997q

res. – reservation validity period

wait. – time when the material is waiting for the library member who reserved the material

ord. – reservation validity period for available material

1st – number of days after the due date, required before the first overdue notice is issued

2nd – number of days after issuing the first overdue notice, required to issue the second overdue notice

3rd – number of days after issuing the second overdue notice, required to issue the third overdue notice

4th – number of days after issuing the third overdue notice, required to issue the fourth overdue notice

fine – period, within which the overdue fine is not charged despite the material being returned late

read. – reading room reservation validity period

You can enter different time parameters for:

- basic types of material (e.g. books, CDs, etc.)
- types of material depending on the content, which is specified in subfield 675s:
 - 82 = fiction
 - 78 = music
 - 79* = entertainment

If you only enter the parameter for the basic type (e.g. CDs) and leave the parameter for the "subtype" blank, the first parameter will also be taken into account for the "subtype" (e.g. CDs – fiction, CDs – entertainment and CDs – music). If, e.g., you wish to have different time parameters for CD-ROM and CD-ROM – fiction, enter the parameter for the basic type and the "subtype".



Note:

In the current version of COBISS3/Loan the parameter "Reading room reservation validity period" is not taken into account!

The values in the table can be as follows:

- number of days or number of months, e.g. 21d or 1m
- blank – loan and loan renewal are not possible for the basic type of material; the parameter for the basic type is taken into account for the "subtype"
- value 0d – loan, loan renewal or reservation of material are disabled



Tip:

If you wish to take into account only work days, add the "*" character in front of the number (e.g. *5d – five work days).



Note:

If the date, calculated on the basis of the specified time parameters, falls on a non-work day, then the new date is postponed to the next work day.



Tip:

When creating a time parameter table for individual departments in a library with departments, the time parameters for the Home library will be transferred, if they have been previously defined.

2.1.1 Loan period expiry date for textbook fund

In school libraries, where loan is organized by departments, a special loan period expiry date can be set in the department that is defined as the textbook fund. This date is taken into account when material is put on loan, regardless of the type of material and the date of loan procedures. The set loan period expiry date will be taken into account until it is either deleted or changed by the library. The loan period expiry date set in this way has priority over all time parameters values in the *borr.* column, which are entered in the **Time parameters table** window.

Procedure

1. In the **Department** class, find and select the department that is defined as a textbook fund, and then use the **Object / Loan period expiry date** method.
2. The **Loan period expiry date** window will open, where you can enter the date in the form *dd.mm.yyy.* into the entry field.
3. To confirm the entry, click the **OK** button.



Note:

- *Setting the loan period expiry date is linked to all usernames that are logged into the application after the setting is changed.*
- *The loan period expiry date must be greater than the current date.*
- *The loan period expiry date does not affect other loan transactions where values of other time parameters are taken into account (e.g. parameters in columns *res. ren.*, etc.).*

2.2 CALENDAR

The calendar with a list of days when the library is closed is maintained with the method **Home library / Calendar**. If departments are not open at the same time in a library in which loan is organised in separate departments, define the calendar separately for each department. Find and select the department in the **Departments** class and then use the **Object / Calendar** method.

When you record the material for the library member, the non-work days will be taken into account when the expected return date is calculated, so the return date is never a day when the library is closed.

Sundays and national holidays are already marked as non-work days in the calendar. All other non-work days must be marked additionally. You can mark:

- individual dates – highlight the desired date in the selected year and click the **Define** button
- days that are always non-work – highlight the column with the desired days of the week and click the **Select all** button to mark all the days (e.g. every Thursday) of the month in the selected year
- specific days of the month – highlight the selected date (e.g. 10 January) and click the **Select all** button to mark all similar dates in the selected year (e.g. the 10th day of every month)
- several subsequent days – to highlight them, hold the <Ctrl> key while highlighting, and then confirm your selection by clicking the **Define** button

Non-work days can be de-selected in a similar way by using the **Remove** button.



Note:

*The changes in the calendar do not affect the previously recorded dates in the records of material for library members, so it is important to enter new non-work days **in time**.*

2.3 LOAN TYPE (PQ TABLE)

Only those copies of material can be put on loan to library members, for which loan restrictions or loan bans were not set up during the process of cataloguing. If certain copies cannot be put on loan or their loan period is different, you can set up a loan restriction for these copies within the cataloguing software by making entries to the subfields 996/997p – *Availability level*, 996/997q – *Status* and 996/997u – *Loan restriction*.

The time restriction for the loan of every individual item is defined by the content of subfield 996/997p, if it contains one of the following values:

- 1 – limited access – up to 7 days*
- 2 – limited access – 7 days*
- 3 – limited access – 14 days*

The loan restriction or loan ban is defined by a combination of the contents of subfields 996/997p and 996/997q. The values entered in those subfields warns the person in charge of loan that there are special restrictions placed on the item and that the item can only be put on loan under special conditions or cannot be put on loan at all (e.g. the value 7 in subfield 996/997p warns the person in charge of loan and the member that the item is not intended for loan).

For individual occurrences of these subfields, one of the loan types for outside loan or reading room loan is specified in the **Loan type (pq table)** table:

Loan type

- the item can be put on loan **without restrictions**
- the item can be put on loan **with restrictions**

When you select such an item, the software will warn you that the subfields 996/997p or 996/997q contain a value that restricts the loan. You can put the item on loan despite the restriction, if you highlight it and confirm the selection by clicking the **OK** button.

- the loan of the item can be **denied**

When you select such an item, the software will warn you that the item cannot be put on loan.

The default parameter values that define the outside loan or reading room loan are displayed in table 1.

Table 1: Default values for loan types (pq table)

p / q	blank	1	2	3	4	5	6	7	8	9	10	11	12	13	14	+	-
blank	00	22	22	22	22	22	11	22	22	22	22	22	22	22	22	22	22
1	00	22	22	22	22	22	11	22	22	22	22	22	22	22	22	22	22
2	00	22	22	22	22	22	11	22	22	22	22	22	22	22	22	22	22
3	00	22	22	22	22	22	11	22	22	22	22	22	22	22	22	22	22
4	10	22	22	22	22	22	11	22	22	22	22	22	22	22	22	22	22
5	11	22	22	22	22	22	11	22	22	22	22	22	22	22	22	22	22
6	11	22	22	22	22	22	11	22	22	22	22	22	22	22	22	22	22
7	22	22	22	22	22	22	22	22	22	22	22	22	22	22	22	22	22
8	33	22	22	22	22	22	11	22	22	22	22	22	22	22	22	22	22

In the table, the rows refer to different values of subfield 996/997p – *Availability level*, and the columns refer to different values of subfield 996/997q – *Status*.

Two values are entered to each table cell following the structure XY (e.g. 10):

- Y – outside loan
- Z – reading room loan

The values in the table refer to:

- 0 – loan not restricted
- 1 – restricted loan (the employee must decide whether to put the material on loan or renew the loan period despite the restriction)
- 2 – loan denied
- 3 – self-checkout not possible, although unrestricted loan applies in the library



Note:

If a library wants to have parameter settings other than default, a written request must be sent to IZUM.

You can see the current loan settings by using the **Home library / Show loan parameters** method. To display outside loan settings in the **Loan parameters** window, select **Outside loan type**; to display reading room loan settings, select **Reading room loan type**.

2.4 ELECTRONIC NOTIFICATION

Parameters for electronic notification on the library level are maintained by the **Home library / Electronic notification** method. By setting up these parameters, the library specifies which types and methods of notification (e-mail or SMS or both) will be available to its members. Library members can subscribe only to those types of electronic notifications which are available in the library.

The **E-notification** window will open, where you can tick the checkbox under individual types of notifications to select the method of notification that will be available to your members.



Note:

To turn on automatic e-notifications (notif. about the loan period expiry date, notif. about forth. overdue notice, notif. about membership expiry), no special written request has to be sent to IZUM; the service can be turned on and off by the library.

If a library does not want to send a particular type of notifications to its members anymore, a tick must be deleted in the check-box for this type of notifications. The change will become effective on the following day.

2.4.1 Notification types

You can choose between e-mail notifications, push notifications, or SMS notifications:

- Notification about reservation expiry

A member subscribed to this type of notification will receive a notification if a copy which was reserved or waiting for the member (statuses *O*, *W* or *R*) is deleted from the member's list of recorded material and if the reservation validity period expired. The event can be activated individually if the person in charge of loan deletes such a copy from the member's records or as a batch if deletion of expired reservation is performed (see chapter 4.13.4).

- Notification about received reserved material

A member subscribed to this type of notification will receive a notification if the material that was reserved by the member was returned to the library or if the available reserved material is ready for collection (status *W*). If the member is the first on the list of reservations, he/she will receive a notification when another member returns the material at the lending desk. The member can receive a notification even if the reservation whose validity expired is deleted, or if the member who was before him/her on the list of reservations

cancelled the reservation (statuses *O* and *W*).

- Notification about loan expiry date

A member subscribed to this type of notification will receive a notification when a certain number of days is left before the loan period expires (the default values is 3 days for loan and 5 days for interlibrary loan) for any copy on outside loan or borrowed through interlibrary loan. The member will receive the notification only once for each item. The notifications are sent out automatically once a day in a batch of notifications.

- Notification about a forthcoming overdue notice

A member subscribed to this type of notification will receive a notification when the loan validity period expires for any copy on loan and when a certain number of days is left before the overdue notice will be sent out (e.g. 3 days). The member will receive as many notifications about a forthcoming overdue notice for each copy of material as are set by the library (1st overdue notice, 2nd overdue notice, 3rd overdue notice and 4th overdue notice), but no more than four. The notifications are sent out automatically once a day in a batch of notifications.

- Notification about membership expiry

A member subscribed to this type of material will receive a notification that his/her membership will expire soon (e.g. in a week). A member will receive the notification about the membership expiry only once when a specified number of days is left before the membership expires. The notifications are sent out automatically once a day in a batch of notifications.

- General notifications

A member subscribed to this type of notification will receive general notifications from the library (e.g. changes in the opening hours, etc.). SMS notifications of this type are free of charge for the member.

- Notification about outstanding debts

A member subscribed to this type of notification will receive a notification about outstanding debts when the specified number of days exceeds the date when the debt was entered (the default value is 3 days). The notifications are sent out automatically once a day in a batch of notifications.



Note:

To ensure that the member knows from which library the notification was sent when he/she receives an SMS notification, the library must define the Abbreviated library name or lib. dpt. name local code list (CODE 316). At the beginning of an SMS notification, a library or department name is displayed if it is entered in the local code list. A library acronym represents the code in the local code list for libraries without departments (e.g. FFLJ), while the abbreviated library name represents the code resolution. In libraries with

departments, a two-digit department ID must be added to the acronym (e.g. SIKMB01). Abbreviated library name must not exceed 30 characters.



Note:

You can change the text for e-mail notifications according to your needs. If you wish to do that, copy the appropriate system variable to user variables and change the text there.

2.4.2 Creating and sending general notifications

General notifications can be created and sent as follows:

Procedure

1. First select the **Member** class and then the **Class / Send general notification** method.

The **General notification** window will open, where you can specify:

- contents of notification

By clicking the **Enter text** button, a new window will open, where you can enter a notification text or transfer (copy) it from some other document if you saved sample texts to your workspace. If you wish to enter an SMS-notification, the text should not exceed 155 characters.



Tip:

In the general notification for sending by e-mail you can specify the title and greeting arbitrarily. In the **COBISS3/Reports** software module in the **Report variables / Standard / Loan / E-notifications** the variables **General notification title** in **General notification – greeting** are included for this purpose. If you wish to change the default value, copy the variable to the **User definitions** folder and change the content accordingly. If you do not wish to include a greeting in the e-notification, delete the variable content so that the variable will be blank.

- type of notification

Under the selected methods of notification, the methods of notification that a library set under *General notifications* by using the **Home library / Electronic notification** method are displayed and set as default. If a library does not wish to send a general notification with default methods of notification, a tick must be removed from the relevant check-box.

2. To confirm your entry in the window, click the **OK** button.
3. In the **General notification** window, click the **OK** button again.

A search window for members will open, where, based on any criteria you enter, you can search for a member, several members or all members (e.g. you wish to send a general notification only to a certain member category). In the search window, the button **Select all** is available, which enables you to confirm the selection of all found members or all library members that you found by using the **Find all** button.

General notifications via e-mail, SMS notifications and push notifications will be sent immediately when you confirm the selected members in the search window. If you wish to check the notification before distributing it, send a notification as a test to your destination.

If you are sending an SMS notification, it will be sent immediately.



Note:

*The notifications sent are stored in the **Notification** class, where you can find them, view them, and send them again if necessary.*

2.5 CONTACT DETAILS AND INFORMATION FOR COBISS/OPAC

It is recommended for the library to publish its contact details related to the My library service in COBISS/OPAC on its web page (e.g. telephone number and e-mail address for information, special notifications etc.). The web page address where the data is published can be defined by the method **Home library / Contact details and information for COBISS/OPAC**. The members can access the page through the link in the My Library service in COBISS/OPAC. In libraries with departments it is recommended to publish contact details for each library department.

After you select the method **Home library / Contact details and information for COBISS/OPAC**, a window will open where you can enter:

- under "Contact details and info (COBISS/OPAC)" enter the URL address where your contact details and notifications related to the service My library are published
- under "E-mail address for reservations" enter the e-mail address for receiving notification about reservations of available copies carried out via COBISS/OPAC; in libraries with departments, enter e-mail address for each department under data on department
- under "E-mail for copies of e-notifi." enter the e-mail address for receiving copies of e-notifications.



Tip:

If the library has departments and wishes that copies of e-notifications for separate departments are sent to a separate e-mail address, that address is entered in the **Department** editor under "E-mail for copies of e-notifi."

- messages which are displayed during reservation of material via COBISS/OPAC:
 - message about unsuccessful reservation because the member is not subscribed to e-notifications about received reserved material; the message is displayed only if the appropriate settings were set up upon the library's request
 - message about successful reservation of available material; it consists of a record about successful reservation, reservation expiry date and note related to the collection of material
 - message about successful reservation of unavailable material; it consists of a record on successful reservation and reservation expiry date

Default values, which can be changed if needed, are in the fields for messages:

- Under "Res. not possible" the default text of the message which is displayed in case of unsuccessful reservation: *Material is not reserved. Your library does not allow you to reserve material via My library as, in your profile, you did not choose e-notification about availability of reserved material (e-mail or SMS) under your settings. Please set the e-notification parameters in My library (in the E-notification window) or contact your library.*
- Under "Status O" the default text of the first part of the message which is displayed in case of successful reservation of available material is: *Your reservation request received.*
- Under "Status O – valid to" the default text of the second part of the message which is displayed in case of successful reservation of available material is: *Your selected material will be waiting for you in your library until;* reservation expiry date will be automatically added at the end of the text
- Under "Status O – note" the default text of the third part of the message which is displayed in case of successful reservation of available material: *It is recommended to check loan status before collection.*
- Under "Status R" the default text of the first part of the message which is displayed in case of successful reservation of unavailable material: *You reserved currently unavailable material. Once it becomes available, you will be notified by the selected method of notification.*
- Under "Status R – valid to" the default text of the second part of the message which is displayed in case of successful reservation of unavailable material is: *Material reserved until;* reservation expiry date will be automatically added at the end of the text.

2.6 RESTRICTIONS ON OPERATIONS

Various restrictions on operations during loan procedures can be maintained by the **Home library / Restrictions on operations** method. You can define the validity of some restrictions for all members of the same category (e.g. membership validity period). You can also define the validity for other restrictions for all material of certain type (e.g. restricted number of reservations). In libraries with departments it is possible to define different restrictions for each department, except those types of restrictions which refer to membership validity.

You can define:

- **Restricted number of copies on outside loan**
The restriction is taken into account for outside loan. If the restriction has already been set up for the member under "No. of copies on loan restr. (LOAN)", it has priority over the restrictions specified for that member category.
- **Restricted number of copies on reading room loan**
The restriction is taken into account for reading room loan. If the restriction has already been set up for the member under "No. of copies on loan restr. (LOAN)", it has priority over the restrictions specified for that member category.
- **Restricted number of loan renewal periods in COBISS/OPAC**
The restriction is taken into account while renewing loan periods in the My library service in COBISS/OPAC. If the restriction has already been set up for the member under "Renewal lim. (LOAN)" it has priority over the restriction specified for that member category.
- **Restricted number of renewals in library**
The restriction is taken into account while renewing loan periods in library. If the restriction has already been set up for the member under "Renewal lim. (LOAN)" it has priority over the restriction specified for that member category.
- **Restricted number of renewals via automated phone service**
- **Restricted number of renewals via self-checkout service**
- **Restricted number of reservations for member for reservations in library**
You will set up the restriction if you wish to limit the number of reservations of available and unavailable material for the member. The restriction is taken into account when reserving material in a library. If the restriction has already been set up for the member under "No. of reservations restr. (LOAN)", it has priority over the restriction specified for that member category.

- Restricted number of reservations for member for reservations in COBISS/OPAC

You will set up the restriction if you wish to limit the number of reservations of available and unavailable material for a member in COBISS/OPAC. If the restriction has already been set up for the member under "No. of reservations restr. (LOAN)", it has priority over the restriction specified for that member category. If the number of reservations in COBISS/OPAC is not defined and the restriction is defined for reservations in library, the latter will be taken into account for the member.

- Restricted number of reservations of material

You will set up the restriction if you wish to limit the waiting lists for reservations of unavailable material. Enter the maximum number of members that can be added to the waiting list. The restriction will be taken into account when reserving material both in a library and in COBISS/OPAC.

- Membership expiry date

You will define it in libraries where membership expiry is related to some specific date (e.g. end of school year). The date which is defined in that way will be taken into account when recording membership validity automatically, i.e. when renewing membership and recording debt for membership automatically. This date is not taken into account for those member categories for which you defined membership validity period.

- Membership validity period

Membership validity period is taken into account when recording membership validity automatically, i.e. when renewing membership and recording debt for membership automatically. It is possible to define different periods for each member category. The period is entered as *no*, where *n* stands for number and *o* for period (d – day, w – week, m – month, y – year, e.g. 3m is for three months.)

Procedure

1. In the **Home library** class select the method **Restrictions on operations**.

The **Select restriction type** window will open.

2. Highlight the restriction and confirm the selection by clicking the **OK** button.

If you selected restriction type *Restricted number of copies on loan – outside loan* or *Restricted number of copies on loan – reading room*, a window will open where you will define whether the restriction will be applied to the department or to the whole library (Home library).



Note:

If you defined that the restriction would apply to a whole library (in a library with departments), you do not need to define restrictions for each

department in the library. However, if you defined the restriction for the whole library and for each department at the same time, only the restriction defined for each department will be taken into account.

3. The window for entering restriction will open.

- If you selected a restriction that refers to restricting the number of copies on loan, you can define different restrictions for individual types of material (rows in the table) and for individual member categories (column in the table). Restrictions for individual "subtypes" of material (e.g. *books – fiction*) will be taken into account on the basis of entry to subfield 675s. If you enter subject code to subfield 675s ("UDC – Statistics") 82 (fiction), 78 (music) or 79* (entertainment), it is recommended to enter restrictions for "subtypes" of material as well.



Tip:

It is possible to define the highest possible number of items on loan regardless of the type of material. This number is entered into the row "max. total number".

If there are certain restrictions set up for the maximum number of items on loan for each type of material, these restrictions are also taken into account. In this case, the member can borrow the maximum number of items of a certain type of material, and the total number of all items on loan must not exceed the number, defined by the total restriction.

- If you selected a restriction that refers to the number of loan renewals or to the number of reservations for the member, a window will open where you can define different restrictions for each member category (rows in the table). In libraries with departments you can define different restrictions for individual departments (columns in the table), but in that case you do not enter restrictions for the home library at the same time (1st column of the table).
- If you selected a restriction that refers to the number of reservations of material, a window will open where you can define various restrictions for individual types of material (rows in the table). In libraries with departments you can define different restrictions for individual departments (columns in the table), but in that case you do not enter restrictions for the home library (1st column of the table).
- If you selected the restriction *Membership expiry date*, a window for entering the date will open.
- If you selected the restriction *Membership validity*, a window will open where you can define different restrictions for individual member categories (rows of the table).

**Tip:**

If the same restriction applies for example to all member categories, you can copy the value by entering it to one table cell, then select it with the mouse and press the keys <Ctrl <C>, then select the table cells where you wish to copy the value and copy the value by pressing the keys <Ctrl> <V>.

4. Save the changes by clicking the **OK** button.

3 MEMBERS

For loan purposes, libraries keep a record of their library members. A special database is used to enter data on new library members and edit the data on the existing ones.

This chapter describes the procedure of registering new library members, editing and deleting data on members, printing labels for library membership cards, changing the library membership card number (when issuing a new card), searching for members and entering a visit when the visit was not recorded in any other way (e.g. when a member accesses the internet).

To enter member details, use the **Member** editor. Some data on members is mandatory (e.g. "First name", "Surname", "Category", link to "Superior partner" for members – legal entities, etc.). Other non-mandatory data is entered depending on the statistical reports you wish to prepare.

When entering data, the local code lists (e.g. code list of departments of employment) and the global code list (e.g. code lists of post codes and cities) are also used.

The local code lists are maintained in the local databases of libraries. The process of updating local code lists is described in the *COBISS3 Basic Guidelines User Manual, chapter 4.7*.

Subchapters:

- Registering a new member
- Editing data
- Deleting member details
- Printing a label for the membership card
- Changing the membership card number
- Finding a member
- Changing class or grade
- Batch deletion of inactive members
- Entering a visit
- Reference students database

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.

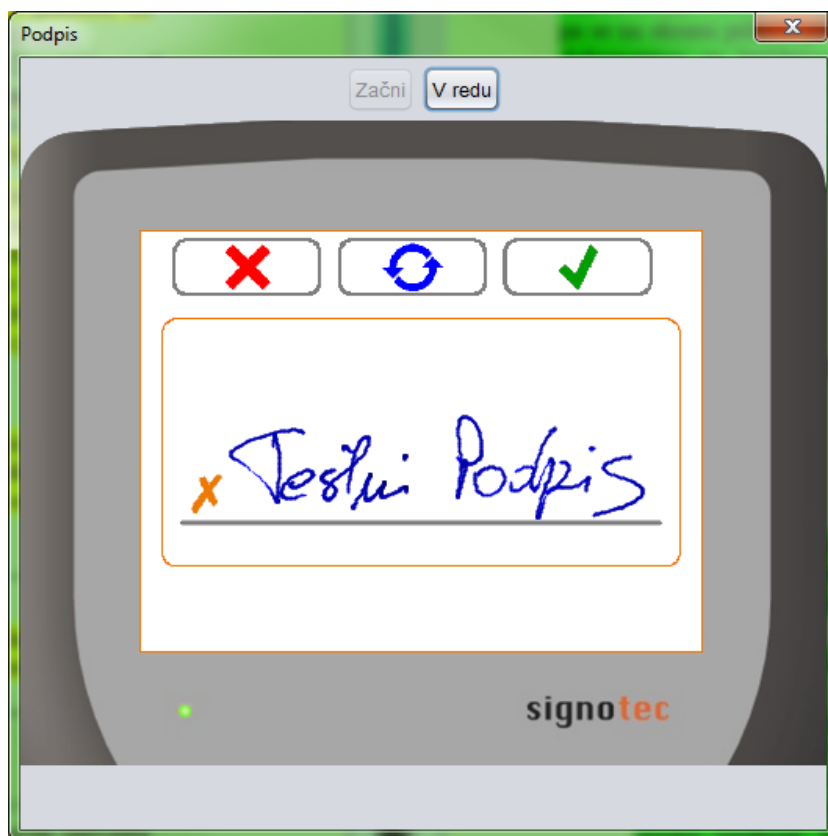


Figure 3.1.4-1: Signature window after the member's signature



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.

3.2 EDITING DATA

Member details are edited in the same window they are entered, i.e. in the **Member** editor window.

Procedure

1. In the **Member** class, find and select the member by using one of the options (see chapter 3.6).



Tip:

If the member is already on the workspace, you can highlight him.

2. Select the **Object / Edit** method.

The **Member** editor will open.

3. Add or edit the data as required.
4. Save the data.

The current date will be recorded under "Date of last visit", and the visit counter under "No. of visits a year (LOAN)" will increase by 1.



Note:

*Changes of the data performed in aggregated objects (**Privileges, Restrictions, Addresses, E-notification, Alternative ident. numbers**) are saved as soon as you close the editor window by clicking the **OK** button.*

3.3 DELETING MEMBER DETAILS

Member details can be deleted from the database if required. You can decide whether to make the membership card number available again or keep it unavailable (in which case you will not be able allocate the number to any other library member).



Note:

To delete member details, the privilege LOAN_DELETE – Deletion of members is required.

Procedure

1. In the **Member** class, find and select one or more member(s) by using one of the methods available (see chapter 3.6).
2. For the selected member(s), use the **Object / Delete member details** method.

The **Deletion of member details** window will open. Use it to specify:

- if the membership card number of the deleted library member should remain unavailable

If you wish for the membership card number to remain unavailable, leave the tick in the **Membership card No. remains unavailable** check-box. This means that the membership card number cannot be allocated to a new library member.



Tip:

The membership card number of the deleted member that was saved under invalid numbers can become available if you find the invalid number and delete it by using the **Delete invalid number** object method.

- the reason for deleting the member's details

From the drop-down list, select the reason for deleting the member's details (e.g. *4 member completed schooling*).

3. To confirm the deletion of member details, click the OK button.



Note:

Member details cannot be deleted if:

- the member still has items on loan,
- the member has debts,
- the member is a superior member in the category 019 – family card,
- a note is entered for the member
- if a pending ILL request or material on pending ILL requests are entered for the member.

**Tip:**

The list indicating the reasons for deleting member data can be prepared in the COBISS3/Reports software module, if you select the report type

LOAN_Mb_04: Deleted members within the **Members** group.

3.4 PRINTING A LABEL FOR THE MEMBERSHIP CARD

When registering a new member, editing member details, issuing a new membership card, etc., you can print out a label for the membership card. This can be done in two ways:

- in the member editor by clicking the **Label** button
- by using the methods **Print** or **Send** for the selected member and selecting *Membership card label* from the available report types



Note:

*The label with member's details can be printed if you saved the data. You can save the data by clicking the **OK** button or the button with the name of the related or contained object (e.g. title) before you exit the editor.*

Options ...

If you wish to print out labels for several members simultaneously, use the option of printing from the report queue. The process of printing from the report queue is described in the *COBISS3/Basic Guidelines* User Manual (see chapter 4.6.4).

3.5 CHANGING THE MEMBERSHIP CARD NUMBER

If a member loses his/her membership card, a new membership card can be issued to the member. In such a case, the member details do not have to be entered again, you only have to change the membership card number.



Note:

To change the membership card number the privilege LOAN_RENAME – Changing membership card No is required.

Procedure

1. In the Member class, find and select the member by using one of the options (see chapter 3.6).
2. Use the method **Change of membership card number** from the shortcut menu for the selected member.

The **Membership card number** window will open. Use it to assign the new membership card number in the same way you defined the membership card number for the first time (see chapter 3.1.1).



Note:

Once the new number is confirmed, the membership card number is changed. The action cannot be cancelled!

3. To confirm the assigned number, click the **OK** button.
The member editor will open displaying the new membership card number. If necessary, you can edit other member details as well.
4. To print out the new membership card label, click the **Label** button.
5. If you edited any other member details, leave the editor by clicking the **OK** button, otherwise click the **Cancel** button.

The old membership card number is automatically saved to **Invalid numbers**.



Note:

You cannot assign an old number to a new member. If you try to use an invalid number for member identification, a warning message will appear.

3.6 FINDING A MEMBER

You can search for a member in several different ways. Which way you choose depends on the aim of the search, such as editing data, lending material, printing a label, etc.

There are two basic types of searching:

- through the quick search window

Highlight the **Member** class and select the **Class / Search by key** method. Use the **Search by key** window to type in the member ID number (membership card number) or enter it by using the reader. Once you confirm the entry by clicking the **OK** button, the member details will be loaded onto the workspace. If the entered membership card number does not exist or is invalid, a corresponding warning message will appear.

- by using the search window

Highlight the **Member** class and select the **Class / Search** method. You can search for a member by using different criteria, e.g. surname, name, category, date of last visit, etc. The search fields are distributed in the following tabs:

- **Member**: browsing general member details
- **Postal address**: searching by data from the postal address
- **Telephone**: searching by telephone number
- **E-mail**: searching by e-mail addresses
- **Alternative/invalid numbers**: searching by alternative numbers (e.g. school number) or invalid (old) membership card numbers
- **Privileges**: searching by member privileges
- **Restrictions**: searching by member restrictions

You can also form a search request by searching in the search fields of several tabs simultaneously. In this case, the search result will contain those library members, who fulfil the set criteria.

Highlight the member(s) you were looking for and load it onto your workspace by clicking the **Select** button.

If you wish to record a material-related change for a particular member, find the member by selecting the **Member** class, and then select the method **Class / Home library material** (see chapter 4).

3.7 CHANGING CLASS OR GRADE

For members of school libraries, the details about the class or grade they are in are usually changed at the beginning of a new school year. This can be done in two ways:

- manually, by changing the attribute value "Class/grade" for each library member in the **Member** editor
- automatically by using the **Change class/grade** method in the **Member** class for several (or all) library members simultaneously



Note:

To use the **Change class/grade** method, the privilege LOAN_DELETE – Deletion of members is required.

Condition

The list of classes or grades must be entered to the local code list *Class, class teacher* (310).

To change the class or grade:

Procedure

1. Select the Member class and then the **Class / Change class/grade** method.

The **Table of classes/grades (local code list Class, class teacher)** window will open.

2. Set the rules for the changes you wish to make.

In the individual rows of the table, you will see all the classes included in the local code list *Class, class teacher* (CODE 310) displayed in two columns. In the *After change* column, select the class which you wish to be the new class of the members. If you do not change this value, the class will remain the same after the procedure. The data on the class will not be changed for those members that do not have a transfer in the table. You can also specify in the table how the class or grade changes for those library members who finished their education (e.g. *C – completed*) if you do not want to delete them.



Tip:

If you do not wish to start the procedure immediately, you can save the current content of the table for later use by clicking the **Save** button. The next time you use the **Change class/grade** method, you can decide if you wish to use the already prepared table for transfer. You can edit or update the table that was already prepared before you start the procedure. If you do not wish to use the table in preparation, answer negatively, and the table will be deleted.

If the number of codes in the local code list *Class, class teacher* (CODE

310) is changed while the table is being prepared and before it is used, you can no longer use the saved table; a new table must be created.

3. Continue the procedure by clicking the **Use** button.

The **Select list of members** window will open. Within the window, two control lists will already be selected, which should be prepared during the transfer: *List of members before change* and *List of members after change*. If you do not wish to print these lists, de-select them.

4. Continue the procedure by clicking the **OK** button.

The **Transfer to next class/year** window will open.

5. To start the transfer, click the **Start** button.

During the procedure, automatic messages will appear.

- If you selected the preparation of report *List of members before change* in the **Select list of members** window, the **Overview and sending of created report** window will open. It is recommended to save the report first (use the **Save** or the **Save as** button) and then print it out if required (use the **Send** button). The list contains details about the members and classes or grades before the change and can be used to check if the transfer was performed correctly.
- The procedure is finished when the corresponding message appears in the **Change of class/grade** window.
- If you selected the preparation of report *List of members after change* in the **Select list of members** window, the **Overview and sending of created report** window will open. It is recommended to save the report first (use the **Save** or the **Save as** button) and then print it out if required (use the **Send** button). The list contains details about the members and classes or grades after the change and can be used to check if the transfer was performed correctly.

6. To close the window after the transfer is finished, click the **Close** button.

When you change the class or grade, the transaction of a change in the member details is recorded. You can prepare a list of members, for whom the class or grade was changed by selecting the report **LOAN-Mb-05: Members – changed details** in the COBISS3/Reports software module. The list includes both the old and the new attribute values for "Class/grade" for each member.



Note:

It is recommended to perform the change of class/grade before you enter new library members starting their education in class 1 or grade 1 in order not to mix up old and new first year students. If you enter new library members first anyway, enter a special code (e.g. N1.a) in the "Class/grade" field or leave it blank. If you have already entered the new members from year 1 and did not label them especially, it is recommended to leave the transfer for these classes/grades in the table of classes/grades unchanged.

3.8 BATCH DELETION OF DATA ON INACTIVE MEMBERS

Starting with the COBISS3/Loan, V4.5-01 software version (November 2008), it is possible to individually delete data on inactive members (**Member / Delete member details** object method), whereby inactivity is established by a librarian. Batch deletion of inactive members, however, is performed on the basis of a programme algorithm that defines which member fulfils the condition for deletion from the library's records.

There are two procedures available for batch deletion of inactive members:

- batch deletion of data on *all* inactive members
- batch deletion of data on *specific* inactive members, which are selected by the library

This procedure is available for easier transition to the daily deletion of data on all inactive members and for deletion of data on inactive members, for which no data on membership validity exists.

3.8.1 Batch deletion of data on all inactive members

Batch deletion of data **on all** inactive members is in accordance with:

- requirements of Article 15 of the Librarianship Act ZKnj-1 (Official Gazette, 87/2001) and Article 21 of Personal Data Protection Act PDPA-1 (Official Gazette 86/2004)
- the information commissioner's interpretation
 - in the SLA publication (23 October 2007) before the SLA session: *To all libraries! Subject: Personal data protection in libraries;*
 - in the on-line publication of the Library News Supplement (2007, (17) 4–5): *"This means that data on inactive members – users, whose membership expired more than a year ago and they no longer have any debts with the library must be regularly deleted".*

The algorithm for batch deletion was confirmed by the National Council for Librarianship (23 April 2008) at their 27th session and later also by the information commissioner in the letter dated 6 May 2008.

When batch deleting inactive members, the members who simultaneously fulfill the following three conditions will be deleted:

Precondition

1. **A member has not visited the library for more than a year.**

A "visit" means any activity in the library (loan, renewal, return, etc.), any activity within the My library service through COBISS/OPAC (renewal, reservation, reservation cancellation, changing the password, or notification

parameters), loan renewal via answering machine or successful member authentication (entering membership card number and password) when logging in to other servers (access to external e-resources). Only members for whom it is recorded under transactions that the date of their last “visit” is sooner or the same as the date of deletion minus one year will not be deleted from the database on members.

If the date of the last visit is empty and other conditions are fulfilled, the data on the member will be deleted. The date of the last visit can be empty as the member was registered by transferring data on members from the excel file.

2. **A member has no debts with the library.**

A member has no debts with the library when nothing of the following is recorded in any department for the member:

- material (on loan, reserved, etc.)
- debt
- note
- pending ILL request or material from pending ILL requests

3. **A membership for the member has expired a year or more ago.**

Membership validity is defined in one of the following two ways:

- If a library updates the “Membership expiry date” field under member details, the date entered will be taken into account.
- If a library updates the “Date of entry/membership renewal” field under member details, the membership expiry date will be calculated by adding to this date one of the following values:
 - membership validity period, entered under “Membership validity” for an individual member
 - membership validity period for all membership categories or an individual membership category that was defined by the library using the **Home library / Restrictions on operations** method; the period is added only for the members who have no value entered under “Membership validity”
 - default period of one year, if the **Membership validity** table is empty and no other period is defined under “Validity period” for the member

If a library does not update data on membership validity for a member (there is no data under “Membership expiry date” and “Date of entry/membership renewal”), a membership for this member will not expire (it is permanent, lifelong). This member will not be automatically deleted from the database, even if he/she fulfils both first conditions for deletion – i.e. the member has not visit the library for more than a year and he/she has settled all debts with the library.

When deleting data on (inactive) members, the members who are not natural persons will be exempt from deletion (category *124 – institution's*)

organizational units, 125 – legal entities – ext. institutions and 126 – interdepartmental loan units).



Note:

To batch delete data on inactive members, the privilege LOAN_DEL_INACT – Batch deletion of inactive members is required.

Procedure

1. Highlight the **Member** class and select the **Class / Batch deletion of all inactive members** method.

2. In the **Deletion of inactive members** window you can specify:

- Sorting of data on report

From the drop-down list, select the value that you wish the inactive members in the lists, which are prepared during deletion, to be sorted by. The default value is *Surname*, whereby the values will be sorted by surname and name. In libraries with departments, inactive members will always be sorted first by department ID under "Department", and after that also by the selected value.

- Execution time

If you wish the deletion procedure to be carried out later, enter the date and time that you wish the procedure to be performed. If you leave the parameter empty, the deletion procedure will be performed immediately.



Note:

In the algorithm for determining a member's inactivity, the current date will always be taken into account, even if the execution time is different from the current date.

3. Click the **OK** button.

The **Deletion of inactive members** window will open. In the window, a short statistics of deletion of inactive members will be displayed:

- number of all members
- number of members, whose membership expired a year ago, or sooner
- number of members, where the »Membership expiry date« attribute is empty
- number of members, where a year or more has passed since their last visit
- number of inactive members, who will not be deleted as they are not, according to the category data, natural persons
- number of inactive members who will not be deleted as material is recorded for these members

- number of inactive members who will not be deleted because pending ILL requests or material from pending ILL requests are entered for the members
 - number of inactive members who will not be deleted as they have not settled their debts
 - number of inactive members who will not be deleted as a note is entered for these members
 - number of inactive members who will be deleted
4. If you wish to continue the procedure, click the **OK** button.

Two control lists will be prepared:

- a list of members who will not be deleted in the procedure as they have not settled their debts with the library (entered material, outstanding debts, entered pending ILL requests) or a note is entered for the members
- a list of members who will be deleted

The prepared lists can be viewed and printed to a printer. You can also print them later in the COBISS/Reports software module, where they will be automatically saved. You can find them in the *Loan* folder, if you select **Browse stored reports** in the menu under **Creating reports**. A window containing a list of prepared reports will open. A file name contains the date and time of the report creation.

5. After printing or previewing the prepared lists, the **Deletion of inactive members** window will open.

Click the **OK** button to confirm deletion of inactive members.

After deleting data on inactive members, the membership card numbers of deleted members will remain unavailable and you will not be able to assign them to new members.



Tip:

If you start the procedure with a delayed execution time and the deletion has not started yet, you can cancel it by selecting the **Class / Cancel deletion of inactive members** method in the **Member** class. When the procedure is done, you will receive a notification to your e-mail address, which was entered under your username.

3.8.2 Batch deletion of data on selected inactive members

When deleting data on selected inactive members, a library can choose the criteria to be taken into account in deletion. Deleting data on *selected* inactive members will be different from deleting **all** inactive members in the following:

- instead of selecting all members, select only a specific group of members, where you can automatically check whether all inactivity conditions are fulfilled
- as an inactivity criteria, you can set any number of years since the last visit, whereby the number of years must be 2 or more
- a condition related to membership expiry will not be considered (data will not be deleted, even if the membership expired a year or more ago)
- a condition related to a membership category will not be considered (data on non-natural persons, if they are among the selected members, will also be deleted)

When batch deleting data on selected inactive members, the members who fulfil all three of the following conditions will also be deleted:

Precondition

1. **A member has not visited the library for a longer period of time than the selected number of years.**

A "visit" is considered any activity in a library (loan, renewal, return, etc.), any activity in the My library service within COBISS/OPAC (renewal, reservation, reservation cancellation, changing the password or notification parameters), loan renewal via answering machine or a successful member authentication (entering membership card number or password) when logging in to other servers (access to external e-resources). Members that you selected in the search window and whose date of their last visit to the library is before the current date, minus the selected number of years (at least two years) will be deleted from the database on members.

If the date of last visit is empty and other conditions are fulfilled, the data on members will be deleted. You can leave the date of last visit empty as the member was registered by transferring data on members from the excel file.

2. **A member has no debts with the library.**

A member has no debts with the library when none of the following is recorded in any department for the member:

- material (on loan, reserved, etc.)
- debt
- note
- pending ILL request or material from pending ILL requests

3. **A member's membership has expired or no data on the membership validity exists.**

The membership expiry date is not greater than the current date. If the membership expiry date is empty and the member fulfils other conditions for deletion, the data on this member will be deleted.



Note:

To batch delete data on selected inactive members, the privilege CIR_DEL_INACT – Batch deletion of inactive members is required.

Procedure

1. Highlight the **Member** class and select the **Class / Batch deletion of selected inactive members** method.

2. In the **Deletion of inactive members** you can specify:

- Number of years from the last visit

As inactivity criteria, enter the number of years since the member's last visit to the library. As the number of years must be more than 1, the default value of the parameter is 2.

- Sorting of data on report

From the drop-down list, select the value by which you wish the inactive members in the lists, which are prepared during deletion, to be sorted by. The default value is *Surname*, which means that the values will be sorted by surname and name. In libraries with departments, inactive members will always be sorted first by department ID under "Department", and after that also by the selected value.

- Execution time

If you wish the deletion procedure to be carried out later, enter the date and time of the procedure to be performed. If you leave the parameter empty, the deletion procedure will be performed immediately.



Note:

In the algorithm for determining a member's inactivity, the current date will always be taken into account, even if the execution time differs from the current date.

3. Click the **OK** button.

The **Search – Member** window will open, where you can search for members to be deleted. You can select members by clicking the **Select all** or **Select** button, if you selected only some of the members from the hit list.

4. The **Deletion of inactive members** window will open.

A short statistics of deletion of inactive members will be displayed in the window:

- number of selected members
- number of members who have not visited the library for the selected number of years or more
- number of inactive members who will not be deleted as material is entered for the members
- number of inactive members who will not be deleted as pending ILL requests or material from pending ILL requests is entered for the members
- number of inactive members who will not be deleted as they have not settled their debts yet

- number of inactive members who will not be deleted as a note is entered for the members
- number of inactive members who will be deleted

5. If you wish to continue the procedure, click the **OK** button.

Two control lists will be prepared:

- list of members who will not be deleted as they have not settled their debts with the library (entered material, outstanding debts, entered pending ILL request) or a note has been entered for the members
- list of members who will be deleted

The reports can be viewed and printed to printers. You can also print them out later in the COBISS/Reports software module as they are automatically saved. You can find them in the *Loan* folder, if you select **Browse stored reports** in the menu under **Creating reports**. A window containing a list of prepared reports will open. A name of the file contains the date and time of the report creation.

6. After printing or viewing the prepared lists, the **Deletion of inactive members** window will open.

By clicking the **OK** you confirm the deletion of data on inactive members.

After deleting the data on the selected inactive members, membership card numbers of the deleted members will not become available and you will not be able to assign them to new members.



Tip:

If you start the procedure with a delayed execution time and the deletion has not started yet, you can cancel it by selecting the **Class / Cancel deletion of inactive members** method in the **Member** class.

3.9 REFERENCE STUDENTS DATABASE

Data on students, which is collected and prepared by the university computer centres based on the record and analysis system of higher education of the Republic of Slovenia (hereinafter: eVŠ), is the basis for creating the reference students database.

The reference students database presents a help for quick entry of new library members by downloading the data from this database. If the member you are entering to the members database, is a student at a higher education institution and there is a record of him in the reference students database, you can download their data from the students reference database to the library members database based on their surname, name, user ID or membership card number (17-digit number) (see chapter 3.1.2.5).

The reference students database can be prepared in the following ways:

- create a new one
- before creating a new reference students database, delete the data in the existing, already prepared database – in this way the reference database will only contain new data on students
- before creating a new reference students database, do not delete the data in the existing – in this way the new data on students (e.g. first-year students, post-graduates) will be added to the existing data



Tip:

Students, for which there is a record in the reference students database, can register for the library by themselves by using their student identity, under the condition that the library offers the option of online member registration and allows the registration of students with their digital identity.

The reference students database is the basis for updating data for students who are already entered in the local library database. For the library member, whose user number can be found also in the reference students database, the data is updated with the new data from the reference database.

The reference students database can be used by one or more libraries together (e.g. libraries from different faculties of one university). When several libraries use it, the reference database is installed to the local database of the library that maintains the database. Other libraries only use the data from the reference database when entering new members and when updating details about members – students.



Note:

The option of using the reference students database is activated in the library with a special parameter at IZUM.

If the same reference database is used by several libraries, special settings are required for the library that creates and maintains the reference students database, and separate settings for the libraries that use the database. These settings are also managed by IZUM.

To perform procedures related to the reference students database, the privilege *LOAN_STUD – Maintenance of reference students database* is required.

3.9.1 Structure of the file with data on students

The library usually prepares the data on students in an Excel file. The file with data on students must contain the following columns:

- user number (8- or 10-digit number)
If you do not use the user number, copy the student transcript number here. The user number is key data for updating data on entered members with data from the reference students database.
- student transcript number (8-digit student transcript number)
- membership card number (17-digit membership card number of a student, which is entered on a RFID chip)
- university (7-digit code of the university in eVŠ)
- study programme (7-digit code of the study programme in eVŠ)
- mode of study (2-digit code of the mode of study)
- year of study (2-digit code of the year of study)
- study programme B (7-digit code of the study programme in eVŠ)
- surname
- name
- date of birth (in the form YYYYMMDD)
- permanent address
- permanent address postcode
- temporary address
- temporary address postcode
- citizenship (3-digit code of the country)
This data does not exist under member details in COBISS3.
- e-mail address



Note:

The Excel file must contain all the listed columns. The following data is mandatory: user number, surname, name, date of birth, address and post code of permanent residence and e-mail address.

3.9.1.1 Converting Excel file with data on students into text file

The reference students database can be created from the text file in which data must be separated with a vertical bar. For this reason, the Excel file must be converted to a text file first.

Procedure

1. Open the Excel file with data on students.
2. Select the option **File / Save as**. The **Save as** window will open. Find a folder into which you wish to save the text file and define the file name.
Under "Save as type", select the option *Unicode Text (*.txt)*.

3. Click the Save button.

In the window with notification about saving the active tab, click the **OK** button. In the window with a notification about the selected type of file *Text (Tab delimited)*, click the **Yes** button. The text file will be saved.

4. Find and open the text file.



Tip:

It is recommended to use Notepad and UltraEdit to edit the text file.

5. Delete the title bar from the text file.
6. Replace the tab character with the vertical bar (character "|") and save the file.



Tip:

You can replace the characters by using the **Replace** function. Under "Find What", enter the tab character by highlighting the blank space between two sets of data in the text file, copy it by pressing <Ctrl> + <C> and paste it by pressing <Ctrl> + <V>. Under "Replace With", enter the character "|" by pressing <Alt Gr> + <W>.

7. In the text file, check and delete blank lines at the end of the file if necessary.
8. Save the file:
 - in Notepad, select *UTF-8* in the window for saving the file under "Encoding"
 - in UltraEdit, you have to convert the data into UTF-8 before saving the file (select **File / Conversions / UNICODE/UTF-8 to UTF-8 (Unicode Editing)**)

3.9.2 Preparing the reference database

The **Reference students database** class is in the **Reference databases** folder.

When the reference students database is used by several libraries, the class is available in the database of the library that maintains it.

The reference students database can be prepared in the following ways:

- create a new one
- before creating a new reference students database, delete the data in the existing database – in this way the reference database will only contain new data on students
- before creating a new reference students database, do not delete the data in the existing – in this way the new data on students (e.g. first-year students) will be added to the existing data

Procedure

1. Highlight the **Reference students database** class and select the **Class / Prepare reference database** method.

A window will open, where you:

- enter the membership expiry date
- mark if you wish for the temporary address from the text file to be entered into the reference students database as a business address

2. Click the **OK** button.

The **Select file** window will open.

3. Find and select the text file with data on students and click the **Open** button.

First the control of mandatory data and the correct data structure in the text file is performed.

The **mandatory data control** is carried out for the following data:

- user number
- surname
- name
- date of birth
- permanent address
- permanent address postcode
- e-mail address

Because of the option of entering students into the reference database via online registration based on their digital student identity the data on the e-mail address is also mandatory.

The **correct data structure control** is carried out for the following data:

- date of birth (the correct data structure must be YYYYMMDD)
- study type (it is checked if the code is in the global code list of study types)
- class (it is checked if the code is in the global code list class/grade)

- e-mail address (it is checked if the e-mail address contains the @ sign)
- university in eVŠ (the code length is checked; must be 7-digit)
- study programme in eVŠ (the code length is checked; must be; must be 14-digit)

The **duplicate record control** is carried out for student records. The software checks if the text file contains any duplicate student records (this is checked based on the user number) and if the student record is already in the students reference database (when you wish to add data to the existing reference database).

If the text file contains data in the incorrect structure, data is missing or doubled, a message is displayed. All errors in the text file must be fixed.

Only once the file structure is correct and all duplicate records are deleted, the student data is entered into the reference database.

After you finish preparing the reference students database, a window with the date and time of starting and ending the procedure, and the number of students entered into the reference students database will open.



Note:

If the reference database already contains student records, the software alerts you and provides the option of continuing without preparing the reference database. If you decide to do so, the new data will be added to the existing data in the reference database. If you do not wish to do that, reply no and then delete the existing reference database (see chapter 3.9.3). Next, prepare the new reference database.

3.9.3 Deleting the data in the reference database

You can delete the entire reference database or individual records in the reference database. Delete the whole reference database when the data is no longer current or you wish to create a new one from scratch. Delete an individual record, if e.g. a student withdraws their agreement for their data to be used for the purposes of library operation.

Procedure

1. Deleting the whole reference database

Highlight the **Reference students database** class and select the **Class / Delete the reference database content** method.

All data in the reference database is deleted.

2. Deleting an individual record

Find the student record(s) in the reference database. Load it onto the workspace and deleted it with the **Object / Delete** method.

3.9.4 Updating data on students with data from the reference students database

Based on the data in the reference students database, you can update the data on the students entered in the local member database. You can update the data:

- at the same time for all students entered in the local member database with records also in the reference database
- for an individual library member



Note:

Before you start the update, make sure you check if the data in the reference database is correct. If the data is incorrect, delete the database and prepare it again. Next, update the database.

During the process of updating you cannot perform any other procedures, so the procedure must be carried out outside working hours. You can set the time of updating by entering the date and time under "Execution time".

The key data for updating is the user number. The data is updated only for those library members with an entered user number and for which there is a record in the reference members database. The following member details are updated: university in eVŠ, study programme in eVŠ, mode of study, study programme in eVŠ – B, year of study, data on permanent and temporary address, and membership expiry date. On the basis of the mode of study, the member category is also automatically updated.

A library can decide that members – students that are not in the reference students database are highlighted after the update. For the relevant members the designation X is added in front of the alternative numbers (user number, student number and card number) which disables the identification of the member with these alternative numbers.

Procedure

1. Highlight the **Member** class and select the **Class / Update data on members – students** method.

A window will open, where a number of members – students, who have a username entered and will be updated, will be displayed.

Mark in the window, whether you wish to perform the **final update** in the members database. The final update means that you highlight the members – students who are no longer in the reference database.

Under “Execution time (dd.mm.YYYY hh:mm:ss)” set the date and time of starting the update. If you do not set the execution time, the update will start immediately.

2. Click the **OK** button.

After the update completes, a window will open with data on the date and time of starting the procedure, date and time of ending the procedure and a

number of members who were checked automatically during the update and updated in accordance with the data in the reference database.

The update statistics can be checked by preparing the report *LOAN-Mb-07: Statistics of updating member details – students*.

Options

You can perform the update for an individual member. Find and select the member and load it to the workspace. Perform the update procedure by using the **Object / Update member details – student** method.

3.10 ENTERING A VISIT

When you wish to enter a visit in the part of the library where loan is not recorded with a computer (reading room, information desk, etc.), use the **Enter a visit** method in the **Member** class. A visit entered in this way will be taken into account for statistics of visits.

You can enter:

- a visit by a member in the reading room
- a visit by a member for other reasons
- a visit by a member for internet access
- a visit by a person who is not a library member

Procedure

1. Highlight the **Member** class and select the **Class / Enter a visit** method.

The **Enter visit** window will open.

2. Select the type of visit and click the **OK** button.

A window will open, where you can enter the membership card number. If you selected *visit by non-member*, a window for entering a membership card number will not open.

3. Enter the (membership or alternative) card number.

If you leave the edit box empty and click the **OK** button, a search window for a member will open, where you can search for a member by any data.

4. Select the member.

In the browser in the part of the window **Related objects**, you can see if there is any material on loan for the member, if any restrictions apply to the member, or if there are any outstanding debts entered for the member, etc.

Under »Date of last visit«, the current date (or the date of performing procedures) is entered; number of visits per year increases for one.



Note:

If a membership has expired for the member or restrictions Entry denied or Membership card retained apply to the member, the visit will not be recorded. Checking the membership validity when entering a visit is turned on by a special parameter upon the library's request.

A visit entered in this way will be taken into account for the creation of the following reports:

- for the following two loan reports in the *Member* group: LOAN-Mb-02: Active members and LOAN-Mb-06: Active members – by department

- for the following two loan reports in the *Transactions* group: LOAN-TR-01: Transactions for member – membership card No. and LOAN-TR-02: Transactions for member – ID No. (when the relevant transaction type is selected)
- for all loan statistics in the *Transactions* group
- for all loan statistics in the *Visit* group
- for all loan statistics in the *Visit by transactions* subgroup
- for all loan statistics in the *Active members* group

4 HOME LIBRARY MATERIAL

All procedures of entering the material (loan, loan renewal, returns) for a selected member are performed in the **Home library material** window. You can access the local catalogue from the **Home library material** window where you can put the material on loan or reserve it for a member.

Subchapters:

- Selecting a member
- Home library material editor
- Outside loan
- Interdepartamental loan
- Reading room loan
- Returning material
- Loan renewal
- Changing the due date
- Entering notes on material
- Printing lending forms
- Displaying a record in the COMARC format
- Viewing the library material status
- Catalogue
- Reserving material
- Routing lists for serials
- Entering the loss of material
- Keeping records on the loan of sets
- Loan in mobile library

4.1 SELECTING A MEMBER

To access the **Home library material** window:

Procedure

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

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

2. You can search for a member in two different ways:
 - by identifying the library member through the membership card number
Type in or use the reader to enter the membership card number in the **Search by key** window. You can also enter the alternative membership card number (e.g. student card number). In this case, the alternative numbers for the members must be recorded previously.
 - by using some other type of data

In the **Search by key** window, leave the entry field blank and click the **OK** button. The member search window will open, which you can use to search for the member (e.g. by name and surname).

You can also access the member search window, if the number you entered does not exist in the members' records.



Tip:

If the member is already on your workspace, use the mouse to highlight it and then use the **Home library material** method from the shortcut menu.

When you select the library member, some programme controls are performed and the corresponding warning messages are displayed:

- If the restrictions *Entry denied* or *Internet access only* are set up for the member, a notification will appear. In case of these restrictions you can only return the material from the **Home library material** window or you can change the restriction for the member in the **Member** editor.
- If a member has the restrictions *Outside loan not allowed*, *Membership card retained*, *Membership card lost* or *Membership card found*, a notification will appear.
- If a member has the restriction *Outside loan not allowed*, the **Outside loan** button in the **Home library material** editor will be inactive; if a member has the *Membership card retained* restriction, the **Lend**, **Renew** and **Reserve** buttons will be inactive, and if a member has the *Renewal denied* restriction, the **Renew** button will be inactive.
- If outstanding debts, which were not settled within the defined period, are entered for the member, a notification will appear. There are no

restrictions for loan procedures. The period is defined by setting up a special parameter upon the library's request.

- If the library member turns 18 and the type of mailing address for overdue notices is set to the guarantor's/guardian's address, a message will be displayed.

If a member is included in the members' records, the **Home library material** window will open.

4.2 HOME LIBRARY MATERIAL EDITOR

The data on the member is displayed in the top part of the **Home library material** window:

- membership card number
- member's name and surname
- member category



Tip:

Upon the library's request, it is possible to include the attribute values "Class/grade", "Course of study", "Department of employment", "Date of birth" and "Special note" for each library member (in libraries that use a common members database). It is also possible to display several attributes at once (e.g. member category and date of birth). For members, whose data is not defined to be displayed in such a way, a member category will be displayed.

- total amount of outstanding debts (in libraries that use a cash register); if the amount is higher than 0, it will be displayed in red
- limitation of number of copies (items) on loan
- restriction on loan renewal
- restrictions
- privileges
- note (displayed in red)
- number of items currently on loan (outside loan , reading room loan or interlibrary loan) to member



Note:


In libraries with departments the number of items currently on loan is displayed for the member for the department in which you are signed in as a user.

- membership expiry date (if the membership has expired, the date is displayed in red)
- date of last visit (if more than one year passed from the last visit, the date is displayed in red)
- note indicators
 - *LST – lost material is recorded for the member*
 - *OVR – the member has an overdue notice recorded for the material on loan*

- *OLD* – the member has already received an overdue notice
- *SPM* – a special membership is recorded for the library member
- *CIR* – material is entered for the member in at least one library department that is different from the login department



Tip:

To access the member details editor from the **Home library material** window, click the  icon.

In the central part of the **Home library material** window, a list of materials will be displayed that are recorded for the member. In libraries with departments, a list of material recorded in the department in which you are signed in as a user is displayed for the member.

If a library uses the COBISS3/Interlibrary loan software module and can lend material from its library collections to its members also through interlibrary loan, the home library material, which you reserved or lent for a member through interlibrary loan, will be displayed in the list of recorded material. In libraries with departments, the data on material borrowed through interlibrary loan will be displayed when you are logged in to a department that performs interlibrary loan (i.e. **ILL department**).



Tip:

In libraries with department you can see the material which is recorded for the member in other departments by finding the member and clicking the **Home library material** folder in the related objects. A table containing the recorded items will open. You can sort the items by departments by clicking "Transaction department".



Tip:

If you wish to record a transaction for the member in a library with departments (e.g. to put material on loan), it is possible to change the department you are signed in to by clicking the **Department** button in the **Home library material** window.



Tip:

If you enter loan procedures in the mobile library, you can select the mobile library stop of your current location from the drop-down list (see also chapter 4.17.2).

The data on individual items of material is displayed in three rows on the list of material and is divided into the following columns:

1st column

- the item status, which can be one of the following:
 - *C(irculate)* – the item is on outside loan
 - *S(tudy room)* – the item is on loan in the reading room
 - *M* – the item is borrowed through interlibrary loan
 - *R(eserve)* – material is reserved
 - *W(aiting)* – the item was returned to the library and is on hold for the library member who reserved it
 - *L(ost)* – the item is recorded as lost
 - *O(rder)* – the item is reserved and available
 - *B(ack)* – the item is returned, but is still recorded for the library member because of possible claims
 - *D* – the item is on loan to another department
 - *K* – the item is on loan for routing
 - *U* – the item is reserved for reading room use
- note on item
- temporary note

2nd column

- material ID

Accession number is displayed for monographs on loan or reserved monographs. Accession number is followed by issue number, i.e. a range of issue numbers bound together for serials on loan or reserved serials in several issues. COBISS.SI-ID is displayed for reserved unavailable monographs followed by volume designation (996d\X) for multi-volume material and by physical form designation (996g\o) for material in different physical forms. For material that is put on loan as a set, the number of the set, the number of the individual set item and the number of all set items (subfield 996/997c) is displayed after the accession number.
- type of material
- the type of material that was taken into account when put on loan or reserved, if it is different from the type of material in terms of physical form (in the case of multi-type material that is put on loan as a set)

3rd column

- description of material

In case of monographs, the following data is displayed: title, author, call number; in case of serials title, call number, copy identifier (997c), volume (997j), year (997k), third level of enumeration (997l), ISSN.

4th column

- item's parent department

For items that are on interdepartmental loan, the numeric code of the department that sent the material available for loan to the member is displayed.

5th column

- date of loan of the item (in case of outside loan, reading room loan and interdepartmental loan)
- dates of renewal (date of last renewal first)
- date of last change of the return date

6th column

- date of reservation of unavailable material, date of reservation of available item, date of allocating reserved material to the member, date of recording the loss, date of return with restriction

After allocating the material to the member the date of reservation is displayed in the 2nd column.

After returning the item that was reserved for reading room loan the date of last reservation will be displayed in the 3rd row.

7th column

- loan expiry date, reservation validity expiry date or expiry data of other loan statuses (e.g. *L – lost*)
- date of last overdue notice receipt



Note:

The loan period expiry date, if before the current date, will be displayed in red.

8th column

- number of days of delay

**Tip:**

On library's request it is possible to set up a special parameter which excludes non-working days defined in the calendar in case of delay.

The number of days of delay is displayed in red if different number of days of delay are taken into account due to parameter settings when automatically recording the fine. In that case the text *according to price list* is displayed as a screen tip before the number of days.

Parameters settings affecting the number of days of delay used to calculate the fine:

- restricted number of days of delay for which the fine will be calculated (daily fine increases until a certain number of days has been reached)
- the fine is not calculated during the fine grace period defined in the table of time parameters
- the fine is not calculated for the period when the price was not defined in the valid price list
- the fine is calculated only until the date of receipt of the 3rd overdue notice

- number of last received overdue notice
- current number of an item in the list of recorded material

Procedures

The buttons in the **Home library material** window give access to the following procedures:

- **Catalogue** – accessing the local catalogue of material, where you can search for, view and select material for loan from the local database in order to put it on loan or reserve it
- **View** – insight into the library material status; for material on loan you can get the information if the material is reserved by other members and for material which is reserved by the member you can get the information who borrowed the material, when you can expect the material to be returned and at which place of the list of reservations the member is
- **COMARC** – displaying a bibliographic record with all fields 996/997 in the COMARC format; individual data can be copied and pasted to the desired place in the editor
- **Lend** – lending the item for outside loan or interdepartmental loan, if the **Outside loan** radio button is selected; or reading room loan if the **Reading room loan** radio button is selected; enter the item's identification number (accession number or loan number) to "AN/LN="

**Tip:**

At the request of the library which borrows the material only to the reading room a special parameter can be used to define the **Reading room loan** radio button as default.

- **Return** – returning the item from outside loan, reading room loan or interdepartmental loan and deleting reservations; before clicking the button, enter the item's identification number (accession number or loan number) to "AN/LN=" or highlight the item on the list; it is possible to delete the reservation of currently unavailable monographs (ID number is COBISS.SI-ID) only by selecting the material from the list
- **Retain** – returning with restriction; before clicking the button, enter the item identification number (accession number or loan number) under "AN/LN=" or highlight the item on the list
- **Renew** – renewing the loan period; before clicking the button highlight the item on the list

**Tip:**

To select all the copies on the list for renewal or return, click the **Select all** button.

**Note:**



*For material that was reserved or borrowed through interlibrary loan in the **Home library material** window, it is not possible to renew loan period, change the expiry validity date, record return or delete reservation of the material.*

- **Reserve** – reserving available and unavailable material from the local database; before you click the button, enter the identification number of the item (accession number or loan number) under "IN/CN="; for reading room reservation, select the **Reading room** radio button
- **Lending form** – printing the list of entered material to printer

**Tip:**

If you click the **Lending form** button and press the <Ctrl> key at the same time, you can change the content of the lending form or destination, to which the lending form will be sent. This depends on the settings for lending forms and invoices, which can be edited by using the **Home library / Create lending forms and invoices** method (see chapter 4.9.1).

**Tip:**

To search through the list of recorded material, use the  (**Find**) button or the  (**Find next**) button.

**Tip:**

The following procedures can also be performed by using a combination of keys:

<Alt> + <I> = Lend

<Alt> + <V> = Return

<Alt> + <A> = Retain

<Alt> + <P> = Renew

<Alt> + <R> = Reserve

<Alt> + <K> = Catalogue

<Alt> + <G> = View

<Alt> + <C> = COMARC

<Alt> + <D> = Lending form

<Alt> + <Z> or <Esc> = Close

<Alt> + <E> =  (member editor)

If the letter on the button with the name of the method is underlined, then the procedure can be performed by using the combination of the key of that letter and the <Alt> key. To get to the list of material for a member from the window for entering the accession number, use <Shift> + <Tab> key combination; to move within the list, use the keys <up> and <down>.

**Tip:**

To copy the accession number of an item on loan, highlight the item and then press the key combinations <Ctrl> + <C> and <Ctrl> + <V> respectively.

**Note:**

A library with members or departments that have a lot of items entered can decide to turn on a special parameter that will enable data to be refreshed manually when a certain number of entered items is reached.

When transferring to the **Home library material** window, a note will be displayed for members or departments that reached the limit, but the entered items will not be visible. The entered items will appear only when you click the **Refresh data** button that will appear in the upper right corner of the window. When performing transactions with material, the material you entered is not visible; if you wish the refreshed data to be displayed, click the **Refresh data** button.

4.3 OUTSIDE LOAN

There are three ways for lending material for outside loan to the member:

- enter the item identification number (accession number or loan number) under "AN/LN="
- find the item in the catalogue and then select it from the list of found copies
- select the copy that is reserved for the member (status *O* – reserved available copy, *W* – waiting on the shelf, or *S* – on loan (reading room))



Note:

*For outside loan, check if the **Outside loan** radio button is selected before you click the **Lend** button.*

The item will be added to the member's list of material. The loan period expiry date is calculated automatically based on the loan period specified for this type of material in the time parameters table (see chapter 2.1).



Note:

When defining the loan period expiry date, the library's calendar is taken into account, which means that the loan period cannot expire on a day when the library is closed (see chapter 2.2). In such a case, the loan period expiry date is set to the following working day.



Note:

In libraries with departments loan period and calendar of the department to which you are signed in as a user are taken into account if different time parameters and calendars are defined for individual departments.

Precondition

If the member or the material has any restrictions that might restrict or disable the loan, an appropriate warning message will be displayed. In the following cases you can decide if you wish to lend the material despite the restrictions:

- the member has already reached the maximum allowed number of copies on loan
- the availability level (996/997p) set up for the item restricts the loan. This usually applies to the availability level 4 – limited access – reading room, 5 – limited access – with author's permission or 6 – contents of document not accessible
- the status (996/997q) set up for the item restricts the loan. Usually this applies to status 6 – damaged

- the copy is reserved for some other member (reservation of an available copy (status O) or the material is waiting for the member (status W))
- the material with the same COBISS-SI.ID is reserved for the member (status R); if you put the material on loan despite that, the reservation will be deleted
- there is a reservation for another member (the material has status R)
- a member has already borrowed material with the same COBISS.SI-ID in another department (a special parameter is turned on)
- as a rule, the last issue of a serial cannot be borrowed from a library (a special parameter is turned on)

The material **cannot be put on loan** in the following cases:

- the item's identification number does not exist
- the item does not belong to the department in which you wish to put it on loan (this applies to the libraries in which loan is organized loan by departments)
- the item belongs to the department in which you wish to put it on loan, but it is currently on interdepartmental loan in another department
- the library will not permit the loan for this type of material (the loan period is not specified in the time parameters table)
- the item is already on loan to a member, retained or lost by a member or reserved for reading room use
- the item is on loan, retained or lost by another member
- the availability level (996/997p) set up for the item disables the loan. This usually applies to availability level 7 – completely inaccessible (archival copy)
- the status (996/997q) specified for the item disables the loan. This usually applies to any status other than 6 – damaged
- loan restriction 0d (996/997u) specified for the copy prevents outside or reading room loan
- the **Lend** button or the **Outside loan** radio button are not active because some restriction preventing outside loan applies to the member (Entry denied, Internet access only, Outside loan not allowed, Membership card retained)
- the **Lend** button is inactive because the upper limit of total debts has been exceeded or the oldest date of entered debts is greater than the time limit set (restrictions taken into account are defined by a special parameter upon the library's request)

**Tip:**

Upon the library's request, a special parameter can be set up, where in the case of unsettled debts in a specified period, a note will be automatically displayed before conditions for loan restrictions are activated.

- the library does not allow the loan to the members which have at least one item on loan for which loan period has already expired.

**Tip:**

Upon the library's request, the material that is currently on loan to another member can be put on loan by setting up a special parameter. If you wish to put such material on loan, a note will appear indicating that the item is on loan, and you can decide whether the item will be entered as returned under the first member at the same time as it is put on loan to a new member. You can also charge a fine (if a library automatically enters debts for a fine), but you cannot check if any reservations exist for the material as this procedure allows the quickest way of transferring the material to another member; for this reason, no additional controls are available. This is common practice in school libraries.

4.3.1 Lending by entering the item's ID number

If the material you intend to put on loan is in front of you, record the loan by entering the item's identification number:

Procedure

1. Enter the item's accession number or the loan number under "AN/LN=" manually or by using a reader.
2. Check if the **Outside loan** radio button is selected.
3. Confirm the entry by clicking the Lend button.

**Note:**

*If your reader is set up to automatically confirm the entry, activate the **Lend** button before entering the accession number.*

4.3.1.1 Lending serials

Serials with unbound or partially bound issues can be lent by entering a comma (",") and the loan unit after the accession number. The loan unit can be the number of the individual issue (if the issues are not bound) or a range of issue numbers bound together.

Serials that do not have separate issues (e.g. serials published annually that do not have numbering on the issue level) or serials where all the issues are bound together, can be put on loan, if you only enter the accession number or the loan number.



Example:

If you wish to lend issue number 10:

AN/LN= 220030010,10

If you wish to lend issues 1 to 5, which are bound together:

AN/LN= 220030010,1-5

If you only enter the accession number for a serial that has unbound or partially bound issues, the **Select issues** window will open. Issues in the list are sorted from newest to oldest issue number. For each individual issue or partially bound issues, the loan status (available, on loan or loan restriction) will be displayed in addition to the issue details. You can lend one or several items at the same time.



Note:

Upon the library's request, a special parameter can be set to disable a loan of the last issue of a serial in the current year or the last issue of a volume available in the library.

4.3.2 Loan with selection from catalogue

If a member has not found the material they wanted to borrow, you can help the member by finding and selecting the material from the catalogue.

Procedure

1. In the **Home library material** window, click the **Catalogue** button.

The **Catalogue** window will open. It is divided into two parts: the upper part with search fields and the bottom part for displaying search results.

2. Enter your search request in the search window and click the **Find** button (see chapter 4.11).

If your search is successful, the number of found objects and a list of those objects will be displayed. Bibliographic data (title, author, etc.) is first displayed for every found material and followed by the list of copies (accession number, call number, etc.). More about displaying search results in chapter 4.11.



Note:

In libraries with departments searching of copies is restricted to the department in which you are currently logged in as a user. This restriction can be changed by selecting the searching option in all departments or in a particular department from the drop-down list in the search window. Copies on interdepartmental loan can be searched in the parent department or in all departments.



Note:

When searching in the **Catalogue** window, only data on those items for which the holdings are defined is displayed. Data on items which are de-accessioned or which have no accession or call number, availability level or status is not displayed.

Items that are not displayed in the catalogue can be found in another way, if necessary, e.g. by using the **Class / Search** method in the **Field 996/997** class.

3. Select the item and click the **Lend** button.

4.3.3 Interdepartmental loan

In libraries where loan is organized by departments (e.g. general libraries) only the copies which have sublocation of the department (in subfield 996/997d or 996/997e) can be put on loan in a particular department. Otherwise you will receive an automatic notification warning you that the copy does not belong to that department.

Interdepartmental loan enables you to put a copy on loan for a certain period of time to another department where you can further lend it.

The following conditions must be met in order to perform interdepartmental loan:

Precondition

- In the local code list *Sublocation* the relation between the sublocation and the department must be defined (e.g. *Y – Youth department#01*).
- In the local code list *Departments (CODE 301)* the list of all departments must be defined.
- In Home library you must enter all departments that will participate in interdepartmental loan. The procedure of entering data on department is described in the *COBISS3/Application administration* user manual (see chapter 2.1.4).
- All copies of material intended for loan must have sublocation in call number in subfield 996/997d, and in case of copy relocation for indefinite period in subfield 996/997e as well.

A department that owns a copy is hereinafter referred to as **parent department** and a department to which the copy is lent is referred to as **host department**.

Interdepartmental loan of material to the host department is recorded in the parent department in the **Home library material** window. The loan procedure between departments is completely the same as loan to the member.

Interdepartmental reading room loan is not possible; for this reason, the **Reading room loan** radio button is inactive.

Procedure

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

The **Search by key** window will open where you will enter two digit host department ID.

2. In the **Department** class you can find the host department in two ways:

- by entering the two digit department ID

In the **Search by key** window, enter the department ID.

- by selecting the department in the **Search – Department** search window.

If you leave the field blank in the **Search by key** window, the **Search – Department** window will open. Use it to search all departments by clicking the **Find all** button. You can sort the list of results by the desired attribute and select the desired host department then.



Tip:

If the department is already in the workspace, select it with the mouse and then select the **Home library material** method from the shortcut menu. If you want to put a copy on interdepartmental loan in a quicker way, select the **Put on interdepartmental loan** method.

You can put the copy on loan in the **Home library material** window:

- by entering the ID of the item in "AN/LN="
- by searching and selecting in the catalogue

The copy will be added to the list of material in the department and the status of the copy is *D – interdepartmental loan*. Loan expiry date is automatically calculated based on the loan period which applies in the parent department. The calendar of the parent department is also taken into account.



Note:

Copies put on interdepartmental loan can be lent only to the members in the host department. Further loan of the material through interdepartmental loan to some other department is not possible.

4.3.3.1 Interdepartmental loan from the department without computerised loan

As a rule, material can be put on loan to another department only in the parent department. In departments where loan is not supported by the COBISS3/Loan software, the procedure cannot be performed. In that case, a transaction can be performed in the host department, i.e. in the department where you wish to put material on loan.

Precondition

Material belongs to a department where loan is not supported by the COBISS3/Loan software.

1. Log in to the host department.

You can log in by:

- highlighting the **Department** class and selecting the **Transition to another department** method and then selecting the host department from the department list
- selecting the **System / Settings / Lending department** from the menu bar

Procedure

3. In the **Department** class, find the host department in the following two ways:

- by entering the two-digit department ID
Enter the department ID in the **Search by key** window.
- by selecting the department in the **Search – Department** search window

4. Highlight the **Department** object and select the **Put on interdepartmental loan from department without computerised loan** method.

The **Interdepartmental loan from department** window will open.

5. Under "Department ID", enter the parent department ID without computerised loan.

A note will appear if the department ID with computerised loan was entered or if the department does not exist.

6. In the **Interdepartmental loan** window, under "AN/LN", enter the identification number of the item.

Material cannot be put on interdepartmental loan if it does not belong to the selected department or if it was already put on interdepartmental loan.

Material is entered as put on interdepartmental loan in the host department, where you can put it on loan to members.

**Tip:**

You can search for material that was put on interdepartmental loan from the department without computerised loan in the **Unavailable material** search window by selecting the department without computerised loan under "Parent department", making a tick under the value *No* under "Returned material", and selecting the status *d – interdepartmental loan* under "Loan status".

4.3.3.2 Interdepartmental return of material to a department without computerised loan

If loan in the parent department is not supported by the COBISS3/Loan software, the procedure of returning material that was borrowed interdepartmentally must be performed in the department that borrowed the material (host department).

Precondition

Material is available and belongs to the department where loan is not supported by the COBISS27Loan software.

Procedure

2. Log in to the host department.

You can log in by:

- highlighting the **Department** class and selecting the **Transition to another department** method and then selecting the host department from the list of departments
 - In the menu bar, select the **System / Settings / Loan department** method
7. In the **Department** class, select the parent department. You can do this in the following two ways:
 - by entering the two-digit department ID
In the **Search by key** window, enter the department ID.
 - by selecting the department in the **Search – Department** search window
 8. Highlight the **Department** object and select the **Return interdepartmentally to department without computerised loan** method.

The **Interdepartmental return from department** window will open, where you can enter the department identification number under »Department ID«.

If ID of the department with automated loan was entered or if the department does not exist, a note will be displayed.

9. In the **Interdepartmental return** window under »AN/LN«, enter the identification number of the item.

If the material in the host department is not available or if it was not put on interdepartmental loan, a note will be displayed.

The material is entered as interdepartmentally returned from host department.

4.4 READING ROOM LOAN

Reading room loan procedure is the same as the outside loan procedure. You can lend material to the member in two ways:

- enter the item's identification number (accession number or loan number) to "AN/LN="
- find the item in the catalogue and then select it from the list of found copies



Tip:

If an item is already reserved for a member (status *O*, *W* or *U*), you can lend the item also by highlighting it in the list and then clicking the **Lend** button.

Before you click the **Lend** button, check if the **Reading room loan** radio button is ticked. The copy will be added to the list of material for the member and has status *S*. The material is normally put on reading room loan only for one day, for this reason, the due date is the same as the date of loan.

If material was previously reserved for reading room use (status *U*), the due date for the material is the same as the reservation expiry date.

When the due date expires, it is displayed in red. If you wish to record debt for the fine automatically, you must define the price for the fine for the material put on reading room loan ("Type of service/debts" is 15 – *ZCI fine – reading room*).

It is possible to limit the number of copies put on reading room loan in the library:

- you can define the maximum possible number of copies put on reading room loan for individual group (category) of members (see chapter 2.6)
- you can define the maximum possible number of copies on loan for a member taking into account both copies on outside loan and on reading room loan. If the restriction is not defined for the member, general restriction is taken into account for member category and even if this restriction is not defined, the restriction for the number of copies on reading room loan will be applied.



Note:

If the restrictions are defined for the member or the material which restricts or disables the loan, an appropriate warning will be displayed. In the following cases you can decide if you wish to lend the material despite the restrictions:

– the member has reached the maximum possible number of copies which the members of the same category can borrow

- *availability level (996/997p) is defined for the copy restricting reading room loan; it usually applies to availability level 5 – restricted availability – with author's permission or 6 – the contents of the document is not available*
- *status (996/997q) is defined for the copy restricting reading room loan; it normally applies to status 6 – damaged*
- *the copy is reserved for other member (it is a reservation of available material (status O) or the material waits for the member(status W))*
- *the material with the same COBISS.SI-ID is reserved for the member (status R), if you put the material on loan despite that, the reservation will be deleted*



Note:

The material cannot be put on reading room loan in the following cases:

- *the item's identification number does not exist*
- *the item does not belong to the department in which you wish to put it on loan (this applies to libraries where loan is organized by departments)*
- *the item is entered as on loan, retained or lost for member*
- *the item is entered as on loan, retained or lost for another member*
- *availability level (996/997p) is defined for the item restricting reading room loan; this usually applies to availability level 7 – completely inaccessible (archival copy)*
- *status (996/997q) is defined for the item restricting reading room loan; this normally applies to status that is different from 6 – damaged*
- *loan restriction 0d (996/997u) specified for the item prevents outside or reading room loan*
- *the **Lend** button is not active if some restriction which, among other, disables reading room loan (Entry denied, Internet access only, membership card retained)*

4.4.1 Entering transaction with material in reading room

Use the procedure if your library does not record loan in the reading room and you would like the loan in the reading room loan to be taken into account for loan statistics.

Procedure

1. Highlight the **Field 996/997** class and select the **Class / Enter transaction with material in reading room** method.
The **Search by key** window will open.
2. Enter the ID of the item (accession number or loan number).
The item will be loaded to the workspace.

Entering a transaction with material in reading room differs from entering loan in reading room in the following ways:

- the status of the copy remains *Available*
- data on the member who borrowed the material in the reading room is not recorded; for this reason, the visit by the member is not recorded

A transaction with material in reading room that was entered in this way will be taken into account when creating the following reports:

- for loan statistics from **LOAN-STA-Mt01** to **LOAN-STA-Mt010**
- **LOAN-Mt-01: Material by transaction** (when the relevant transaction is selected)
- **LOAN-Mt-02: List of most requested material**
- **LOAN-TR-03: Transactions involving material** (when the relevant transaction is selected)

4.5 RETURNING MATERIAL

Returning material refers to the material which has been put on outside or reading room loan (material with status *C* or *S*), returned with restriction (material with status *B*), recorded as lost (material with status *L*) and to deleting the reservations of material (material with status *R*, *W*, *O* or *U*).



Note:

You cannot record return or delete reservation for the material that was reserved or borrowed through interlibrary loan. These procedures must be performed through interlibrary loan.

The material can be deleted from the member's list of material in several ways:

- without selecting the member, by entering the item's identification number
- in the **Home library material** window, by entering the item's identification number (accession number or loan number)
- in the **Home library material** window by selecting the item(s) from the list; only in that way you can delete the reservations of currently unavailable material (material status *R*) where reservation ID number is COBISS.SI-ID



Tip:

In libraries that allow transferring material on loan from one member to another, the return of material can be performed automatically when you put material on loan to another member. This option can be turned on by setting a special parameter upon the library's request. This is common practice in school libraries.

The procedure of returning the material that was put on interdepartmental loan from the host department to the parent department is done in the same way as returning material borrowed by the member. If the material is reserved in the parent department, a note will be displayed.

When returning the material whose loan period has expired you can record the debt for the fine (see chapter 7.2.2.2). If the member has already received the overdue notice and returns all the material for which the overdue notice has been issued, the overdue notice and note indicator *OVR* will be deleted when returning the material.

When returning the material which is reserved, the details on the reservation that is on the top of the list of reservations will be displayed. If **reservation for member** (who has reserved the material in loan) is at the top of the list, the

member's membership card number, together with his/her name and surname, will be displayed. If **reservation for interlibrary loan** is at the top of the list, the details on the new customer (partner symbol or member's name and surname), the number of their ILL request and the date until which the material will be waiting for collection will be displayed.

In case of **reservation for member**, once the material is successfully returned, the material is allocated to this member; at the same time the status of the reserved material is automatically changed from *R – reserved unavailable material* to *W – waiting (reserved)*.

The member is informed about availability of reserved material in a manner provided for this purpose in the library by taking into account method of notification designated by the member (e-mail, SMS). If the member selected e-mail as the method of notification about available reserved material and entered his/her e-mail address, he/she will receive e-mail after the reserved material is returned. If the member selected SMS as the method of notification about available reserved material and entered his/her telephone number, he/she will receive an SMS after the reserved material is returned. The library can receive a copy of the notification sent to e-mail address which was enabled upon the library's request in the configuration file.



Note:

If the material is assigned for interlibrary loan and intended for a member, a notification about availability of reserved material will **not be sent** (by e-mail or as an SMS notification) to the member, even if he/she is subscribed to e-notification about availability of reserved material and has entered his/her e-mail address and mobile phone number.

When returning the material which is reserved and available for loan with restriction, a note will be displayed. If reservation for a member is at the top of the list, you can decide if you will allocate the material to the member. If reservation for interlibrary loan is at the top of the list, the material will be automatically allocated for interlibrary loan (despite the note).

When returning the material which is reserved and not available for loan, a note will be displayed. If reservation for a member is at the top of the list, you cannot allocate the material to the member. The reservation for this material will be automatically deleted if there is no copy of the material accessible without restrictions in the library. If reservation for interlibrary loan is at the top of the list, the material will not be allocated for interlibrary loan but will remain reserved for interlibrary loan.

When returning the material on interdepartmental loan which is reserved in the host department, a note that the material belongs to another department will be displayed. You can decide if you still wish to assign the material to the member who reserved it. If the material is reserved in the parent department and the host department at the same time, you can decide, if you still wish to allocate the material to the member who reserved it in the host department. If you do not confirm the allocation, the reservation in the host department will be automatically deleted.

If in the list of reservations, a reservation for interlibrary loan is in the first place, the material will be automatically allocated for interlibrary loan (notwithstanding the note).

If the parameter for printing the slip with reservation details is set in the configuration file of the library, the slip with reservation details (e.g. member/partner's data, ILL request number in interlibrary loan reservation, data on material, method of notification for the member, etc.) will be printed on the printer used during loan procedures for printing lending forms or payment certificates. After that, the material is put on the shelf for available reserved material along with the slip which contains reservation details.

When returning the material which was on reading room loan (status *S*) and reserved for reading room use before that, a note will be displayed. If a member still wishes to use the material in reading room and the reading room reservation validity period has not expired yet, reconfirm the reading room reservation for the material (status *U*). When you do this, the date of the first reading room reservation will be displayed in the first row of the 6th column, and the date of the last reservation will be displayed in the 3rd row of the 6th column. The date of the reading room reservation validity period will remain the same (i.e. as it was when the first reading room reservation was entered).

When returning material that was entered as lost (status *L*) a note will be displayed in a new window. If you wish to mark the item as permanently lost, select it and confirm the selection. When you confirm the selection, status 8 – *lost* (subfield 996q) will be entered into the holdings data, and by entering availability restrictions *Od* into subfield 996u, loan will be disabled (see also chapter 4.15).



Tip:

If you tick the *Yes* check box in the **Unavailable material** class in the "Returned material" search field, you can search for the material the member returned at his/her last visit. The data on the returned material is stored until the member returns some other material at his/her next visit (not the same day).



Note:

As a rule, in libraries with departments, only copies that were put on loan in the department that you are currently logged in can be returned to that department. However, a library can allow its members to return the material also to another department and not only to the one that they borrowed it from. In this case, a library must make sure that the material is returned to the department where it was borrowed from.

School libraries in which a special parameter is set up upon the library's request can also allow the material that was put on loan in the textbook fund department to be returned to any other department.

An item that was borrowed through interdepartmental loan cannot be returned to the parent department until it is available in the host department.

4.5.1 Returning material without selecting the member

When you wish to return the material quickly without selecting the library member (e.g. in the case of returning a larger quantity of material that was borrowed by different library members), you can select the option of returning the material without member selection.

Precondition

Returning material without selecting a member in libraries with departments is possible only in a department where the material was put on loan, unless this is a textbook fund material (see note above).

Procedure

1. Highlight the **Unavailable material** class.
2. Select the **Class / Return, delete** method.

The **Search by key** window will open. Use it to type in the identification number (accession number or loan number) or enter it by using the reader for the item that you wish to remove from the list of material on loan for the member. It is not possible to enter **record ID** (i.e. COBISS.SI-ID) in this window; thus, it is not possible to delete the reservations of unavailable monographs.

3. If necessary (depending on how the reader is set up), confirm the entry by clicking the **OK** button.

The **Home library material** window will open for the member for whom that item is recorded. The item whose identification number you entered is already selected, the **Return** button is active, so you can confirm the return of the material by pressing the <Return> key.

After you confirm it, the **Home library material** window will close and the **Search by key window** will open again, where you can enter the identification number of the next item to be returned. Exit the window by clicking the **Cancel** button.



Tip:

The library can decide that the **Home library material** window remains open once you confirm the return of material. This option can be turned on upon the library's request with a special parameter.

Options

If you wish to check or enter any other material for the member, highlight the member that was loaded to the workspace and use the **Home library material** method.

4.5.1.1 Returning serials

Serials that do not consist of separate issues (e.g. serials issued once a year that do not have numbering on the issue level) or if all the serials' issues are bound

together, are returned as a monograph. When returning serials with unbound or partially bound issues you have to enter a comma (",") after every accession number, followed by the loan unit. The loan unit can be the number of the individual issue (if the issues are not bound) or the range of numbers of the issues bound together.

If you only enter the accession number, the **Select issues** window with a list of units on loan will open once you confirm your entry. After you select the desired item(s) and confirm by clicking the **OK** button, the **Home library material** window will open for the member for whom the item (or items) was (were) recorded.



Note:

If you selected several units that are recorded for several members, you have to repeat the procedure for every member once you record the return of material for the member with the first selected unit.

4.5.2 Returning material with member selection

The return or deletion of material from the member's material records can also be entered in the **Home library material** window. The material can be returned by entering the item's identification number or by selecting it from the list.

4.5.2.1 Returning material by entering the item's ID number

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.

The member can be found by using the library membership card number or by using some other type of data (see chapter 4.1).

The **Home library material** window will open.

3. Under "AN/LN=", type in the item's identification number or enter it by using the reader.
4. To confirm the entry, click the **Return** button.

The issue will be removed from the member's list of material.



Note:

*If your reader is set up to automatically confirm the entry, activate the **Return** button before entering the accession number.*

4.5.2.1.1 Returning serials

To return serials with bound or partially bound issues, enter a comma (",") after every accession number, followed by the loan unit. The loan unit can be the number of the individual issue (if the issues are not bound) or the range of numbers of the issues bound together. Serials that do not have separate issues (e.g. serials published annually that do not have numbering on the level of issues) or serials where all the issues are bound together are returned as monographs.

When you return serials in several issues and if you only enter the accession number, the **Select issues** window will open containing the items that are recorded for the selected member. Select the desired item. Once you click the **OK** button, the selected item will be removed from the list of materials on loan for that member.

4.5.2.2 Returning material by selecting it from a list

You can also remove the material from the records by selecting it from the member's list of material.

Procedure

1. Highlight the issue(s) (one, several, or all).



Tip:

You can select all the issues on the list for return by clicking the **Select all** button.

2. To return the highlighted issue(s), click the **Return** button.



Tip:

To view the material the member returned at the time of his/her last visit, select the **Returned home library material** folder for the member. The list of returned material can be printed out in the form of a lending form, if you use the **Object / Print** or **Object / Send** method for the member, and select the **Returned material** report format in the **Report definition selection** window.

4.5.2.3 Returning material with restriction

Returning material with restriction is a special method used for returning material. If you wish to examine the returned material for potential claims (the material might be either damaged or a part might be missing from the toy set, etc.), you return it with restriction. After the procedure has been performed, the material remains recorded for the member until all debts are cleared for the member after examination. Return with restriction is used also for entering the return of incomplete or damaged sets (see chapter 4.16).

Precondition

Return with restriction is possible:

- for material which is on outside loan or reading room loan (status *C* or *S*)
- in the **Home library material** window for the selected member

Procedure

1. In the **Home library material** window, highlight one item (or more items or all items) for the selected member, or enter or read the item identification number (accession number or loan number).



Note:

If your reader is set in a way that entry confirmation is automatically added, activate the **Retain** button before entering the accession number.



2. Click the **Retain** button.

Tip:

If you return the material with restriction in the **Home library material** window, you can perform the return by pressing <Alt> + <A>.

The status of the entered material is changed from *C* or *S* to *B* – *retained*. When calculating the due date, the time parameter *res.* (status *R*) will be taken into account. The date of entering the return with restriction is entered under “Date of return”, which will be displayed in the 1st row of the 6th column. The number of items on loan will be reduced accordingly for the member.

If the loan period has already expired and a library charges a fine for this type of material, you can enter debts for the fine.



Note:

*If the material is reserved for another member, it is not allocated to the member when the material is returned with restriction. Only after the procedure is completed and the material is deleted from the records, the reserved material can be allocated to the next member on the list of reservations (status *W*), and all standard procedures are performed at the same time (printing a slip with data on the reservation, sending e-notifications, etc.).*

Material that was returned with restriction will appear in a special table on the lending form.

When the procedure of examining material is completed, delete the material from the member’s records (the **Return** method).



Note :

*The material returned with restriction is saved to the **Returned home library material** folder only after you delete it from the member's records.*



Notes:

Material returned with restriction can be reserved but it is not available for loan until it is deleted from the member's records.

Status B validity expiry date can only be changed manually.

Overdue notices are not created for material returned with restriction. Also, e-notifications about a forthcoming loan period expiry date and about a forthcoming overdue notice are **not** sent for material with status *B*.

4.5.2.4 Returning material in any department

Libraries with departments can allow its members to return the borrowed material to another library department.

Precondition

Returning material to a department where the material was not borrowed from is possible only in the **Home library material** window for the selected member by entering the item's identification number.

Procedure

1. In the **Home library material** window under "AN/LN=", enter or use a reader to enter the item's identification number (accession number or loan number).

A window will open explaining that material is on loan to another department.

2. Select the item that you wish to return and confirm the selection by clicking the **OK** button.

The item will be deleted from the list of entered material for the member in the department where the item was borrowed from.

A window will open informing you that material has to be returned to the department where it was borrowed from as soon as possible. A slip with data on the material is printed, which you attach to the material. Place the material to the spot where you keep materials from other departments.

Material that was returned to a different department than where it was borrowed from will get status *B – retained* in the department material records.

If the loan period for the material has expired and a library charges a fine for this type of material, debts for this fine can be entered when the material is returned to another department. Debts for the fine will be entered in the department where the material was borrowed from. If a member wishes to settle the debts immediately, first select the department where the material was

borrowed from or the value *all departments* and then the appropriate debts settlement in the **Debts settlement and entry** window.

If a library charges the costs of returning the material to another department, you can enter the debt for the return to another department. The debt will be entered in a department where the material was returned.

If there is a reservation for this material in the department where the material was borrowed from, a note about the reservation will be displayed. The material is **not** allocated to the member with reservation, the slip with reservation details is **not** displayed, and e-notification about availability of reserved material will **not** be sent.

After material is delivered to the department where it was borrowed from, the material must be deleted from the material records for the department to which the material was returned.



Note:

The material that was returned to another department and has status B – retained is not available for loan until it is returned to the department where it was borrowed from. You can, however, reserve the material at your parent department.

Log in to the department to which the material was delivered.

Procedure

1. Highlight the **Department** class and select the **Home library material** method.

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

2. Enter two-digit department ID.

The **Home library material** window will open.

3. Select the material from the list or enter or use the reader to enter the item identification number (accession number or loan number) under "AN/LN=".

4. Click the **Return** button.

The material with status *B – retained* will be deleted from the list of retained material in the department.

After entering the return of material to the department where the material was borrowed from, the reserved material will be allocated to the next member from the list of reservations (status *W*), and all standard procedures will be performed (printing a slip with reservation details, sending e-notifications, etc.).

4.6 LOAN RENEWAL

Loan renewals for outside loans can only be performed in the **Home library material** window. You have to find the member for whom you wish to renew the loan period first. You cannot renew the loan period for the material put on reading room loan in this way, but you can change the expiry date manually (see chapter 4.7). You can renew the loan period for the material borrowed through interlibrary loan only for interlibrary loan.

Upon the library's request, a special parameter can be set up to enable loan period renewal for the material for which an overdue notice has been entered and reservation validity renewal for the reserved material (loan statuses *R*, *W* or *O*).

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 using the library membership card number or some other data (see chapter 4.1).

The **Home library material** window will open.

3. In the **Home library material** window, highlight the item (or items) for which you wish to renew the loan period.



Tip:

You can select all issues on the list for renewal by clicking the **Select all** button.



Tip:

Upon the library's request, a special parameter can be set so that when you select all the material by using the **Select all** button for renewal, the material that is entered for the member in other library departments will also be renewed.

When a library sets up this parameter, you can renew the due date or reservation validity in other departments by clicking the **Renew** button even if no item is entered in the current department.

4. Click the **Renew** button.

The new due date for the selected item(s) is calculated on the basis of the renewal period for the individual types of material by taking the current date into account. The current date is also entered as the date of renewal.

When renewing loan period for the item whose loan period has expired, you can record the debt for the fine (see chapter 7.2.2.2). If a library allows loan renewal for material for which an overdue notice was received, the overdue notice will be deleted when the loan period is renewed.



Note:

When defining a new loan period expiry date, the library's calendar will be taken into account, so the loan period cannot expire on the day when the library is closed (see chapter 2.2). In this case, the first working day is defined as the due date.



Note:

If different time parameters and a calendar are set for individual departments, the renewal date and the calendar of the department where we are logged in are taken into account.

Precondition

In case of loan period restrictions for the member or the material, a warning message will appear. You can decide whether you wish to renew the loan despite restrictions in the following cases:

- the member reached the loan renewal limit for the item
- the availability level or the status set up for the item restricts the loan (see chapter 2.3). This usually applies to the availability levels (996/997p) 4 – limited access – reading room, 5 – limited access – with author's permission or 6 – contents of document not accessible (special treatment) and status (996/997q) 6 – damaged.
- the loan period is exceeded and the member has already received an overdue notice for the item on loan

The **loan cannot be renewed** for the material in the following cases:

- the item is on interdepartmental loan (status *D* – *interdepartmental loan*), the **Renew** button is not active
- the item was borrowed through interlibrary loan (status *M* – *interlibrary loan*)
- the item is entered as retained or as lost for the member (status *B* or *L*)
- the member has the restriction "Renewal denied", the **Renew** button is inactive
- the **Renew** button is inactive because the upper limit of total debts has been reached or the date of the oldest entered debts exceeded the time period (restrictions that are taken into account are defined by setting special parameters upon the library's request)



Tip:

Upon the library's request, a special parameter can be set up, where in

the case of unsettled debts in the specified period, a note will be automatically displayed before conditions for loan restrictions are activated.
--

- the library will not allow renewals for this type of material (the renewal period in the time parameters table is 0d or is not specified at all)
- the availability level or the status set up for the item prohibits the loan (see chapter 2.3). This usually applies to availability level (996/997p) 7 – *completely inaccessible (archival copy)* or to any status (996/997q) other than 6 – *damaged*
- the loan restriction (996/997u) for the item is set to 0d (996/997u)
- the newly defined loan period due date would be older than the previously defined one
- the material is reserved for other member
- the library does not allow loan renewal for the material for which an overdue notice has been issued
- the library does not allow the loan renewal to members which have at least one item on loan for which loan period has already expired.

4.7 CHANGING THE DUE DATE

In case of special treatment of a specific material or a specific library member, you can set up a new due date that is different to the one normally calculated based on the time parameters for that type of material. First, put the item on loan. The loan period will be set up based on the time parameters for this type of material. Next, you can change the due date as required. You can change reservation expiry date and status *B – retained* and status *L – lost* expiry date in the same way. The procedure can only be performed in the **Home library material** window. In order to renew the loan, you have to find the member first.

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 using the library membership card number or some other data (see chapter 4.1).

The **Home library material** window will open.

3. Highlight the due date that you wish to change.

Double-click the due date (7th column Due/ovrd) for the item in the list of material. Overwrite the old due date with the new due date, and confirm the date by pressing the <Enter> key.



Tip:

If you wish to change the date for several copies simultaneously, hold the <Ctrl> key, highlight the copies and double-click on one of the due dates of the highlighted copies (you can now release the <Ctrl> key). Enter the new due date and confirm by pressing the <Enter> key. The due dates will be changed.



Tip:

If you wish to change the date for all copies on loan simultaneously, select all the copies by clicking the **Select all** button, then press and hold the <Ctrl> key and double-click one of the due dates for the selected copies (you can now release the <Ctrl> key). Enter the new due date and confirm by pressing the <Enter> key. The due dates will be changed.

If you can renew loan period in all departments at the same time (see chapter 4.6) in a library, after you click the **Select all** button, an option to define the changed date also for the material that is entered in other departments for the member will be offered.



Note:

You cannot change the due date for the material that was reserved or borrowed through interlibrary loan.

In a similar way, you can enter an unlimited due date by pressing the <X> key. The new due date will be displayed as XX.XX.XXXX.

If you wish to extend the due date for any number of days (d), weeks (w), months (m) or years (y), delete the calculated due date and then enter the number and symbol of the period (e.g. 3m for 3 months) in place of the date.

The current date is entered as the date of the last update.

When changing loan period for the item whose loan period has expired, you can enter the debt for the fine (see chapter 7.2.2.2).



Note:

The new due date you enter must be more recent than the current date.



Note:

When changing the due date manually, the loan period restrictions for the member or item will not be checked. If there is a reservation of the material for another member or a reservation for interlibrary loan, a note will be displayed, but you can change the due date despite the reservation.

4.8 ENTERING NOTES ON MATERIAL

In the **Home library material** window, enter or edit the note for any item of material in the list of recorded material. The notes on the material can be related to the member, for whom the material is recorded (temporary notes) or to the actual item of the material (notes on items). When you enter a note, the username of the librarian who entered the note, the time and the date of the entry will be recorded. When you edit notes, this data will only be displayed for the last change made.

4.8.1 Entering a temporary note

Notes on the material that are related to the library member for whom the material is recorded are called temporary notes. When the member returns the material, for which a temporary note was entered, the note is deleted automatically. Temporary notes can only be entered in the **Home library material** window. You have to find the member with the material, for which you wish to enter a temporary note, first.

Procedure

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

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

2. Select the member.

The member can be found by using the library membership card number or by using some other type of data (see chapter 4.1).

The **Home library material** window will open.

3. Find the item in the list of recorded material and double-click on the third row in the 1st column St/Nt.

The **Temporary note** window will open.

4. Enter the note.

The temporary note will be visible in the **Home library material** window and in the viewer of the recorded material.

4.8.2 Entering a note on item

For loan purposes, you can also enter notes on the items that are only related to the actual item of the material regardless of the member the material is recorded for. These notes remain saved even after the member returns the material. For serials with bound or partially bound issues the note applies to all

units with the same accession number. For this reason, it is recommended to enter the unit designation (e.g. issue number) when the note refers only to one unit.

Notes on items can be entered in the **Home library material** window. You have to find the member with the material, for which you wish to enter a note on item, first.

Procedure

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

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

2. Select the member.

The member can be found by using the library membership card number or by using some other type of data (see chapter 4.1).

The **Home library material** window will open.

3. Find the item in the list of recorded material and double-click on the second row in the 1st column St/Nt.

The **Note on item** window will open.

4. Enter the note.

Options...

You can also enter a note on the item by using the method **Field 996/997 / Note for loan**. In this case, you have to find the item first in the **Field 996/997 class**. Next, select the **Enter note for loan** method from the shortcut menu for the selected field 996/997.

4.9 PRINTING LENDING FORMS

In the **Home library material** window, you can print out a lending form, i.e. the list of material recorded for the member.

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.

The member can be found by using the library membership card number or by using other data (see chapter 4.1).

The **Home library material** window will open.

3. Click the **Lending form** button.

The **Overview and sending of created report** window will open. Use it to send the report to previously defined or changed destinations. The process of preparing and sending a report is described in the COBISS3 Basic Guidelines User Manual (see chapter 4.5).



Note:

In libraries with departments the list of material recorded for the member is printed for the department in which you are signed in as a user.



Note:

If a library uses COBISS3/Interlibrary Loan software module and lends the material from its library collections through interlibrary loan to its members, the material that you reserved for the member or lent to the member through interlibrary loan will also be displayed on the lending form.

Options

You can also print out a lending form by finding the member in the **Member** class and then selecting the **Object / Print** or **Object / Send** method.

4.9.1 Creating lending forms and invoices

Use the procedure to create, edit, archive or delete lending forms and invoices. The form is defined and maintained by the library information service, and the content is defined and maintained by the library. The set lending forms are used when creating lending forms in the **Home library material** window, when you press the **Lending form** button. The set invoices are used when creating an

invoice in the **Debts settlement** window, when you press the **Send** button. If you select a specific setting, a lending form can be sent to a library member's e-mail address.



Note:

If a library has no lending forms and invoices prepared, default lending forms and invoices will be used. Default forms contain general data and texts in the domestic language. Printing lending forms and invoices on the narrow format (thermal printer) is set as default. Default forms cannot be edited or deleted!



Note:

To create lending forms and invoices, the LOAN_EDT – Changing loan parameters privilege is required.



Note:

If a library, before this change, already had a special parameter set up to create lending forms and invoices (e.g. member name and surname, librarian's name and surname, additional data on material, cash amount and change, list of outstanding debts, etc.) in the COBISS3/Loan software module, based on the Loan minutes, the content of lending forms and invoices was already configured by IZUM.

Furthermore, lending forms and invoices were configured for a library if the library already customized variables for a lending form and invoice, by moving a signature and note on lending form from the Standard folder to the User folder and were customized there according to their needs.

Customized forms are called Customized forms (IZUM).

Procedure

1. Highlight the **Home library** class and select the **Create lending forms and invoices** method.

The **Lending forms and invoices** window will open, where data on the currently valid lending forms and invoices will be displayed.

2. Select one of the procedures to continue with maintaining lending forms and invoices:
 - Creating new forms
 - Editing forms
 - Activating forms
 - Deleting forms

3. After clicking the **Select** button, continue the selected procedure or cancel the procedure by clicking the **Exit** button.

4.9.1.1 Creating new forms

You can create a new form group for lending forms and invoices on the basis of default forms or by using forms that were already prepared.

Procedure

1. In the **Lending forms and invoices** window, select the **Create new forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.
The **Create new forms** window will open.
3. In the *Form group* field, enter the name of the new form group and confirm by clicking the **OK** button.

**Note:**

*New form groups are saved in the form of a file; for this reason, the following characters must not be used: <, >, :, ", /, \, |, ?, *.*

The **Form groups** window will open.

**Note:**

When you create lending forms and invoices for the first time, the Form groups window will not open, because no new forms were prepared. In that case, when creating new forms, data from default forms will be used.

4. Select one of the previously prepared form groups for lending forms and invoices that you will use to create new forms.
5. Confirm the selection of the form group by clicking the **OK** button.

The **Edit data on lending forms and invoices window** will open. In the title bar you can see the name of the new form group that you will edit. All the data from the form group that was previously selected will be displayed in the window. The window is divided into three panes.

Individual columns contain:

1st column – Applies to

In libraries with departments, the names of departments with automated loan, for which the data defined on the lending forms and invoices will apply, will be displayed in individual rows. In libraries with no departments, *Home library* will be displayed in the only row.

2nd column – Format

In this column, by clicking the selected cell, a drop-down list will be displayed, where you can select one of the values to define the lending form and invoice format. You can choose one of the following values:

- 0 – narrow format (thermal printer)
- 1 – wide format (A4)

**Note:**

In this column, you must be careful to ensure that the selected format for the relevant printer is set in accordance with the settings of the logical destination (Lending form – Loan) when you are logged in with your username. If you print lending forms and invoices to different printers in different departments under your username, you must, after you log into the COBISS3 software, edit the settings for the relevant printer in the logical destinations.

3rd column – Destination

In this column, by clicking the selected cell in the table, a drop-down list will be displayed, where you can select one of the values to define a destination or a combination of destinations to which the lending form should be sent (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). The destination setting does not apply to invoices, as invoices are always sent to printers. You can choose one of the following values:

- 0 – printer
- 1 – printer or e-mail (Ctrl)
- 2 – e-mail
- 3 – printer and e-mail

**Note:**

Sending a lending form to a member's e-mail address is intended only for lending forms. A lending form that is sent to a member's e-mail address always contains all the material that was entered.

4th column – Select material

In this column, by clicking the selected cell, a drop-down list will be displayed, where you select one of the values to determine which material will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). All the material from the login department will be displayed as default. You can select one of the following values:

- 0 – all material
- 1 – all material or selected material (Ctrl)
- 2 – selected material

5th column – Today's material

In this column, by clicking the selected cell, a drop-down list will be displayed, where you select one of the values to determine whether all material or only today's material will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). All the material from the login department will be displayed as default. You can select one of the following values:

- *0 – all material*
- *1 – all material or today's material (Ctrl)*
- *2 – selected material*

6th column – **All departments**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether material from all departments will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). Only the material from the login department will be displayed as default. You can select one of the following values:

- *0 – department's material*
- *1 – department's material or material from all departments (Ctrl)*
- *2 – material from all departments*

7th column – **Additional data on material**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether an additional data will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). Only the title of the material will be displayed as default; only one additional data can be displayed. You can select one of the following values:

- *0 – no additional data*
- *1 – accession number/issue number*
- *2 – author/data on serial*
- *3 – call number*

8th column – **Outstanding debts**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether a list of outstanding debts for the member will be displayed on the lending form. A lending form without outstanding debts will be displayed as default. You can select one of the following values:

- *0 – no outstanding debts*
- *1 – outstanding debts*

9th column – **Borrowed material (on invoice)**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether a list of borrowed material will also be displayed on the invoice. An invoice without the list of borrowed material will be displayed as default. You can select one of the following values:

- 0 – without borrowed material
- 1 – with borrowed material

10th column – **Cash and change (on invoice)**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether cash and change amount will also be displayed on the invoice. An invoice without cash and change will be displayed as default. You can choose one of the following values:

- 0 – cash and change
- 1 – without cash and change

11th column – **Preview**

In this column, numeric values of data used on the lending forms and invoice are displayed in the cell of the table.



Tip:

If you wish to see the content in numeric values, you can use the screen tip. If you place the mouse cursor on the selected cell, types of data that can be used on lending forms or invoices will be displayed. First you will see the content of the values used on default lending forms and invoices.

In the upper right part of the window, select the type of data that you wish to edit from the drop-down list. In the **Preview** column, you can edit one or several types of data. An individual type of data can have several content versions, based on the department where the lending form or invoice was prepared (applies to libraries with departments).

When you first edit the data, default content will be displayed under the selected type of data. An individual content version is marked with a number, based on which the selected content is visible in the **Preview** column.

Positions of individual types of data are displayed as an example on the invoice for the narrow format, which includes a list of material (see figure 4.9-1).

You can choose between four different types of data:

1. Data on department/additional data

Data on the library name or the superior partner (if specified in the home library) will be displayed on default lending forms and invoices. Right below the library name, the address and contact details of the library department will be displayed. If the library does not have departments, the address and contact details of the home library will be displayed by default (phone, FAX and e-mail).

The library can use a new content version to replace the default data on the department and the contact details with other text. In this case, the desired content must be entered for this type of data. If a library with departments wishes that the department name is also displayed, they

must include the variable value %library department% or enter the department name manually.

2. Additional member data

The *membership card number* and *member name and surname* data already contains the default value, which can be changed by editing the current content version or adding a new one. If you wish only for the *membership card number* data to be displayed, remove the second part of the selected type of data, or remove both parts of the selected type of data.

3. Note on invoice

The *note on invoice* data already contains the default value, in the place of which the note that was entered when you created the invoice in the **Debts settlement** window under »Note (to be displayed on invoice)« will be displayed. If you wish the note that was entered when creating an invoice not to be displayed on the printed invoice, the value must be removed from the existing content version or a new content version must be added.

4. Additional data at the end of lending form or invoice

This type of data already contains the default text »Lent by«, the variable value for the *librarian's name and surname* data and the default text "*Thank you for visiting our library. We look forward to seeing you again soon.*« You can edit the existing content version or add a new version and change it accordingly.



Note:

In libraries that are liable for fiscal verification of invoices, the display of data on the person who borrowed the material is obligatory. For this reason, it is best not to change the default settings.

COBISS Koper - Capodistria, 23.09.2016 11:02:05

Univerza na Primorskem Universta' del
Litorale
Titov trg 4
6000 Koper - Capodistria
ident. št. za DDV: SI10044264

Knjižnica TEMENA
Glagoljaška 8
6000 Koper - Capodistria
tel.: +386 5 611 75 72
faks: +386 5 611 75 71
e-pošta: temena@upr.si

1. Data on department/additional data

0302007 Član Testni
Datum poteka članstva: 25.04.2017
Fakulteta za turistične študije - Turistica

2. Additional member data

**RAČUN št.: PROSTORODDI-
ENapraval-20150268**

obveznost	kol.	neto cena	skupaj
fotokopije - A4 ba	10,0	0,50	5,00 C
4. opomin	1,0	4,00	4,00 A

DDV		1,10
za plačilo	EUR	10,10
gotovinsko plačilo	EUR	20,00
vračilo	EUR	9,90

osnova	stopnja DDV	znesek DDV
5,00	C DDV 22 %	1,10
4,00	A Oproščen promet	0,00

znesek	klavzula za oprostitev DDV
4,00	Oproščeno DDV v skladu s 13. tč. 42. člena ZDDV-1

Dolgovri so v celoti poravnani!

3. Note on invoice

SEZNAM GRADIVA

Evidentirano gradivo	vmesti do/tip
Matematični priročnik /	03.10.2016/ knj
Matematika I	03.10.2016/ knj
Management and	03.10.2016/ knj

Bibliotekar/ka:
Marko Kušar

Hvala za obisk in nasvidenje!

Umik knjižnice:
pon-pet: 8.00-18.00
sob: 7.30-13.00

4. Additional data at the end of lending form or invoice

ZOI: a2be09a7c000d24bb327847b2bc6ee28
EOR: f6da1c57-be40-4d5a-b074-e9d78c0fcdff



Figure 4.9-1: Example of an invoice with types of data displayed for narrow format (thermal printer)

“Field for editing the selected data type:”, where you can edit the content to be displayed on lending forms and invoices, is at the bottom part of the window. You can save several content versions, and each version will be in its own numbered row. Under the selected type of data, select the content version that you wish to edit. The selected content will be displayed at the bottom part of the window, where you can change it accordingly.



Note:

When editing data, do not use the % character as this character is reserved for entering variable values.

To edit the content of the selected type of data, you can use the following functions or button:

- **Insert variable value**

When editing data on forms, you can use pre-prepared variable values, in the place of which an actual value will be displayed on the lending form or invoice.

You can enter the following variable values:

- member name and surname
- librarian's name and surname
- library department
- membership expiry date
- member's faculty
- membership card number
- note on invoice

- **Save**

Use the **Save** button to save the changed content version.



Tip:

When editing data, you can also use the *Insert variable value* function. By using this function you can turn on the selected variable value in the place of which the actual value will be automatically displayed on the prepared lending form or invoice (*membership expiry date, note on invoice, etc.*).

- **Add**

Use the **Add** button to define new content for the selected type of data.

You can do this by selecting the content version for the selected data type, updating it if necessary, and clicking the **Add** button. For one type of data you can add several content versions; each version will receive its own running number, which cannot be changed. Content versions may not be sorted by order number.

- **Delete**

Use the **Delete** button to permanently delete the selected content version in the upper right part of the window. You can do this by selecting the content version for the selected data type and clicking the **Delete** button.



Note:

If the content version is used in the form group for lending forms and invoices, it cannot be deleted. You will be automatically notified where in the cell in the »Preview« column the content version was used.

- **Up**

Use the **Up** button to move the selected content version in the upper right part of the window for one or several rows up. When moving the content version, its current number does not change as it is related to the content version for the type of data.

- **Down**

Use the **Down** button to move the selected content version in the upper right part of the window for one or several rows down. When moving the content version, its current number does not change as it is related to the content version for the type of data.

The buttons for saving and cancelling the creation of lending forms and invoices:

- **OK**

By clicking the **OK** button you save the existing or newly prepared forms group for lending forms and invoices.

- **Cancel**

By clicking the **Cancel** button you exit the data editor for lending forms and invoices without saving.

4.9.1.1.1 Editing data on lending forms and invoices

You can edit data on lending forms and invoices in the »Preview« column in a table. In individual cells, numerical values for displaying data in the home library or in a specific department (in libraries with departments) are listed. In the **Editing data on lending forms and invoices** window you can edit four types of data.

In each cell there are four numbers, separated by a comma, which represent different types of data on lending forms and invoices. The default values are 1, but the library can change these.

Procedure

1. Use the mouse to highlight the selected cell in the »Preview« column for the home library or for a specific department (in libraries with departments).
2. Then select the desired type of data and the content version for this type of data from the drop-down list in the upper right part of the window. Double-click to confirm the selected content version. The current number of the content version (visible at the beginning of the row) will be transferred to the highlighted cell to the place that is defined for this type of data (e.g. type of data 3. *Note on invoice* in the highlighted cell will be transferred to the place with the current number of the content version).

Continue editing lending forms and invoices in every cell in the home library or in a specific department (in libraries with departments).

3. Save the changes in the form group by clicking the **OK** button.



Tip:

In libraries with departments you can copy the content of an individual cell into other cells in the »Preview« column (e.g. the content of data to be displayed in the first department is the same or similar to all other departments).

You can copy the content by highlighting the selected cell with a mouse and press <Ctrl> + <C>. Then highlight the desired cell or several cells at the same time (e.g. for all departments at the same time) and paste the content by pressing <Ctrl> + <V>. If only one content version for a specific type of data (e.g. 4. *Additional data on the lending form and invoice*) is different, change only this data in the selected cells of an individual department.

4.9.1.2 Editing forms

Select the option of editing lending forms and invoices if you wish to change or update the data in the already created forms.

Procedure

1. In the **Lending forms and invoices** window, select the **Edit forms** radio button.
2. Confirm the selection of the procedure by clicking the **Select** button.
The **Form group** window will open.



Note:

Default lending forms and invoices cannot be edited. If a library has not yet created new forms and the Edit forms procedure is selected, a note that says that default forms cannot be edited will be displayed. New forms must be prepared on the basis of default forms.

3. Select one of the previously prepared form groups for lending forms and invoices and confirm the selection by clicking the **OK** button.

The **Edit data on lending forms and invoices** window will open. In the title bar you can see the name of the form group that you selected for editing.

Continue the procedure of editing forms in the **Edit data on lending forms and invoices** according to instructions (see chapter 4.9.1.1).

4.9.1.3 Activating forms

In a library that does not create lending forms and invoices, default forms are valid. Activating new or already existing form groups for lending forms and invoices can be activated only when all the necessary data for form groups are edited and saved.

Procedure

1. In the **Lending forms and invoices** window, select the **Activate forms** radio button.

2. Confirm the selection of the procedure by clicking the **Select** button.

The **Form group** window will open, where you can select one of the prepared form groups for lending forms and invoices that you wish to activate.

You can also select default lending forms and invoices.

3. Confirm the selection of the form group by clicking the **OK** button.

Currently valid form group will be displayed in the upper part of the **Lending forms and invoices** window.

4.9.1.4 Deleting forms

A library can permanently delete the prepared form groups for lending forms and invoices if they are no longer needed.



Note:

Default lending forms and invoices as well as currently valid lending forms and invoices cannot be deleted. If you select the valid form group, you will automatically receive a notification that you cannot delete it.

Procedure

1. In the **Lending forms and invoices** window, select the **Delete forms** radio button.
2. Confirm the procedure by clicking the **Select** button.
3. The **Form group** window will open, where you select one of the prepared form groups for lending forms and invoices that you wish to permanently delete.

**Note:**

If there is only one form group for lending forms and invoices prepared in a library, you will be automatically asked if you are sure you want to delete the form group.

4. Confirm the selection of the form group by clicking the **OK** button.
Form deletion will be performed only after a question appears on the screen and you confirm the deletion by clicking the **Yes** button. You can cancel the deletion by clicking the **No** button.
5. The selected form group will be deleted and you will be returned to the **Lending forms and invoices** window.

4.10 DISPLAYING A RECORD IN THE COMARC FORMAT

In the **Home library material** window, you can view the data for each item on the list of recorded material in the same format that is used in the bibliographic database.

Procedure

1. Find and select the item in the **Home library material** window.
2. Click the **COMARC** button.

The **COMARC format record** window will open displaying the bibliographic data and the holdings data for the selected material.

The **COMARC format record** window can remain open while you perform other procedures. If necessary, you can also copy data from that window.

Options

The data on the material in the COMARC format can also be viewed in the **Catalogue** window.

4.11 INSIGHT INTO THE LIBRARY MATERIAL STATUS

In the **Home library material** window you can get the information on who borrowed or reserved the material for an individual copy in the list of recorded material. If there is a list of reservations for the borrowed or reserved material, you will also get information about who else reserved the material.

Procedure

1. Find and select the item in the **Home library material** window.
2. Click the **View** button.

The **Insight into the library material status** window will open displaying first the basic data on material (title, author, publication year and language of publication for monographs, or title, ISSN, language of publication and publisher for serials) and then the following:

- accession number
- date of loan or reservation entry
- last loan renewal date
- loan due date or reservation due date
- loan status
- data on library member or partner who has borrowed or reserved the material (for the member, the membership card number, name and surname of the library member will be displayed; for the partner, the symbol of the partner will be displayed)
- ILL request number (only if the material is reserved for interlibrary loan or borrowed through interlibrary loan)

If the material is reserved, the list of reservations will be displayed. In this list, date of reservation, data on the member or partner, for whom the material is reserved, ILL request number (in reservation for interlibrary loan) will also be displayed. In libraries with departments the data on the department in which the reservation has been recorded will also be displayed.

Options

You can also view the library material status, if you click the **View** button in the **Catalogue** window. In that way, you will get information on who borrowed the item and information on possible reservations.

You can also check the loan status for an individual copy of material by finding it in the **Field 996/997** class. If the copy is unavailable, data on loan or reservation (**On loan/reserved** folder), possible list of reservation for this material (**Reservations** folder), data on the member or partner, who has reserved or borrowed the material, and the ILL request number (only if the material is reserved for interlibrary loan or borrowed through interlibrary loan) are accessible from the related objects.

4.12 CATALOGUE

You can access the local material catalogue from the **Home library material** window by clicking the **Catalogue** button.

The catalogue enables you to:

- search the material
- display selected bibliographic records and the corresponding holdings data from the local database in the COMARC format
- view the material loan status with the data on who borrowed the material and who reserved it
- put the material on outside or reading room loan
- reserve the material for outside loan, reading room loan or interlibrary loan

Elements of the **Catalogue** window are:

- title bar where the icon of the COBISS3 software, name of the window, department in which you are signed in as a user (in libraries with departments) and the button for closing the window are displayed
- two tabs for selecting the class; the selection depends on the criteria by which you wish to search for the material in the local database, while the result is always a bibliographic record and its corresponding holdings data
- search fields
- fields for entering search requests
- the **Find** button for performing the search
- the **Clear** button for deleting the entered search requests and search results
- drop-down list which includes library departments from the local department code list (CODE 301) (it can be seen in the **Catalogue** window only in libraries with departments)
- the buttons **Find** and **Find next** for searching through the list of found bibliographic records and corresponding holdings data
- radio buttons for type of loan or reservation of material
 - **Outside loan** for putting on outside loan or reservation of material for outside loan
 - **Reading room loan** for putting on reading room loan or reservation of material for reading room loan
 - **Through ILL** for reservation of material for interlibrary loan¹

¹ The button is active only in libraries that use the COBISS3/Interlibrary loan software module.

- the **View** button for insight into status of library material on loan (information who borrowed the material and who reserved it)
- the **COMARC** button for displaying selected bibliographic records or corresponding holdings data from the local database in the COMARC format
- the **Lend** button for putting the material on loan
- the **Reserve** button for reservation of material
- the **Close** button for exiting the catalogue without putting on loan or reserving the material

4.12.1 Searching for material in catalogue

In the **Catalogue** window you can search for material by various criteria: by accession number or loan number, call number or call number elements etc. (search fields under the **Field 996/997** tab) and by author, title, ISBN or ISSN etc. (search fields under the **Bibliographic record** tab).

Procedure

1. Enter the search request to the selected search fields (see also the *Basic Guidelines COBISS3* user guide, chapter 4.3.1.2).
2. In libraries with departments select the department from the drop-down list in which you wish to search for the material (the list includes library departments from the local code list (CODE 301)).

Searching for the material in the department in which you are signed in as a user is set to default. You can search for material in other departments or in all departments at the same time.

3. Click the **Find** button.

4.12.2 Displaying data in the catalogue

Results of the search in the catalogue are always bibliographic data from the local database and the corresponding holdings data. The following fields are not displayed: fields 996/997 which have status 9 – *de-accessioned* entered to the subfield q and fields 996/997 which have no accession number or call number or availability level or status (there is no value in subfields 996/997f, d, p and q).



Note:

*Holdings data that are not displayed in the catalogue can be found in another way, if necessary, e.g. by using the **Class / Search** method in the **Field 996/997** class.*

Bibliographic record for which there is no holdings data is not displayed in the catalogue.

If the search results contain several bibliographic records from the local database, the newest will be displayed first. It means that the record with the highest ID number (COBISS.SI-ID) and the corresponding holdings data are displayed first, then the remaining records and their corresponding holdings data sorted descending.

Holdings data of a bibliographic record is sorted depending on availability level of the material for the loan. Copies of material which have the most favourable status for the user are displayed first.

The data is displayed in appropriate colour depending on the loan status and availability of the material for loan:

- **green** – the item is available, unrestricted outside loan applies to the item, the loan period is displayed:
 - from subfield 996/997u (loan restriction) if a value other than 0 is entered to the subfield
 - from subfield 996/997p (availability level) if the value 1, 2 or 3 is entered to the subfield
 - from the time parameter table (depending on the type of material)
- **orange** – the item is available, unrestricted reading room loan applies to the item
- **blue** – the item is available, restricted outside or reading room loan applies to the item
- **red** – the item is not available (it is on loan or reserved and waits for the member or for interlibrary loan), the due date or reservation expiry date is displayed
- **black** or **grey** – outside or reading room loan is disabled, an appropriate comment, i.e. value from the status code list (subfield 996/997q) or from the code list for availability level (subfield 996/997p) explaining why the material cannot be put on loan is displayed



Note:

For serials in several issues volume details are always displayed in black, individual issues of the volume are displayed in appropriate colour depending on the loan status or depending on the loan availability.

Unrestricted or restricted loan type and loan disabled for the material with restricted availability are specified in the table Loan type (pq table) (see chapter 2.3).

In *libraries with departments* search results are bibliographic records and the corresponding holdings data for the material which is the property of the selected department. This restriction can be changed in the search window by selecting the search option in all departments or in a particular department from the drop-down list. Copies on interdepartmental loan can be searched in the parent department or in all departments simultaneously. For material on interdepartmental loan information about parent and host department is displayed before the loan status. Holdings data for every bibliographic record is sorted depending on availability of the material for loan and by ascending numbers of departments (e.g. items of material from the department 01 that are available for outside loan and for which unrestricted loan applies are displayed first, then items of material from the department 02 that are available for outside loan and for which unrestricted loan applies etc.).

For monographs the following data is displayed:

- accession number, loan status and call number in the first row
- status or availability level (if loan is not possible or if only restricted loan is possible) in the second row
- physical form in the third row

For serials the following data is displayed at the volume level:

- accession number, data on numbering on the first level and call number in the first row
- number of copies or copy identifier and status or availability level (if loan is not possible or if only restricted loan is possible) in the second row
- data on numbering on the third level and physical form in the third row



Note:

If there is no data on individual issues or on several issues bound together entered to subfield 997m for a serial, the loan status will be displayed in the first row instead of data on numbering on the first level.

If there is a list of reservations for a monograph, the total number of all reservations for that material is displayed for all items in the third row of the first column (e.g. *Number of all reservations: 4*). If there is a reservation for interlibrary loan (or several of these reservations) in the list of reservations, the data about the place of the first reservation for interlibrary loan in the list of reservations (e.g. *Place of the first ILL reservation: 3*) will also be displayed. For serials reservation details can be seen if you use the **View** method for individual field 997.



Note:

In libraries with departments data in "Number of all reservations" defines the number of all reservations of unavailable material in a certain

*department and **not the total number of all reservations** of that material in all departments. The data under “Place of the first ILL reservation” also defines the place of the first reservation for interlibrary loan in the list of reservations only in the department in which you reserved the material.*





Note:

Upon the library's request, by setting up the parameter in the configuration file, you can change the default report format of the call number and define which elements and punctuations should be displayed in the call number. As default report format of the call number depends on the value of the shelving indicator, the defined format will apply for all material, with no regard to the shelving indicator.



Tip:

In the search results you can find bibliographic record or holdings data by using the  L88  (Find next) button.



Tip:

The following procedures can also be performed by using a combination of keys:

<Alt> + <I> = Lend

<Alt> + <R> = Reserve

<Alt> + <G> = View

<Alt> + <C> = COMARC

<Alt> + <N> = New search

<Alt> + <Z> or <Esc> = Close

To move within the list of material, use the keys <up>, <down>, <PgUp>, and <PgDn>.

Options

You can also access the local catalogue window by using the **Material / Catalogue** method. In this case, you can only use the methods **View** or **COMARC** for the material or the item.

To view the material's status for each item, you can also find the item in the **Field 996/997** class and then see from the related objects (**On loan/reserved** folder) if an item is available or on loan. If an item is unavailable, data on loan or reservation (**On loan/Reserved** folder), possible list of reservations for this material (**Reservations** folder), data on the member or partner who has borrowed or reserved the material, and the ILL request number (when the material is reserved for interlibrary loan or borrowed through interlibrary loan) can be obtained from the related objects.

4.13 RESERVING MATERIAL

You can reserve available or unavailable material for the selected member from the local database of the home library, if there are no loan or reservation restrictions that apply to the material. If the member can access the My library service in COBISS/OPAC (has a password and no restrictions), he/she can enter a reservation by him/herself. Upon the member's request it can be done by a librarian in the COBISS3/Loan software module. If the material is not available, after a successful reservation the member is placed on the list of reservations. The member who is on the top of the list gets the material first as he/she reserved the material first.

If your library uses the COBISS3/Interlibrary Loan module, data on the customer (partner or member)¹, for which the home library material has been reserved upon receiving the ILL request, can also be displayed in the list.

In libraries with departments, you can reserve available or unavailable material (status *O* or *R*) also for an individual department. The procedure is the same as for reserving material for a member. In case of a reservation, the department will be added to the queue in the same way as for members. Once the material is assigned to a department, the material will have the status *W* – *waiting on the shelf (reservation)*. The material with the status *O* or *W* will receive the status *D* only when it is put on interdepartmental loan.

When returning the unavailable material, which was reserved also by other members, a notification with reservation details that is at the top of the list of reservations will be displayed. If ***reservation for member*** (who reserved the material in loan) is at the top of the list, the membership card number and the name and surname of the member will be displayed. If ***reservation for interlibrary loan*** is at the top of the list, the data on the new customer (partner symbol or a member's name and surname), their ILL request number and the date until which the material will be waiting for collection will be displayed.

In the case of a ***reservation for member***, the material is allocated to the member after a successful entering of the return of material, whereby the status of the reserved material will be automatically changed from *R* – *reserved unavailable material* to *W* – *waiting on the shelf (reservation)*.

The member will be informed that the material has been received in a way that is provided by the library for this purpose (e-mail, SMS notification, telephone call). The material is placed on the shelf for available reserved material along with a slip which contains details on the member who is the first on the list of reservations.

E-notification about the received reservation for a department will be sent to the e-mail address that is entered under the data on the department.

¹ The COBISS3 software enables entering interlibrary loan procedures also in libraries that transfer material from their own library collections through interlibrary loan to their members (and not only to libraries and other organizations in Slovenia and abroad).

The reserved available material must be prepared and the member who reserved the material must be notified. Notify the member in a way which he/she chose from available options (e-mail, etc.) and place the material on the shelf for that purpose.



Note:

*If the material is assigned for interlibrary loan and intended for a member, a notification about received reserved material will **not be sent** (by e-mail or SMS notification), even if the member is subscribed to e-notifications about received reserved material and the member's e-mail address and mobile phone number are entered.*

Precondition

General conditions for a reservation are:

- a reservation can be entered only for a member or a library department that was previously selected
- reservation of the material is not possible if there is no copy available for loan, unless the copy has value 2 – *in process* in subfield 996/997q in libraries with departments a reservation of the item can be entered only in a department to which the item belongs, i.e. to which it was put on interdepartmental loan; for a department you can reserve material **only** in the item's parent department

You can enter a reservation for the material in the following two ways:

- if a physical copy is in front of you, you can enter a reservation by entering or reading identification number of the copy in the **Home library material** window and clicking the **Reserve** button
- if material is not in front of you, you must find the material in the catalogue first, select the material and then reserve it

Below is a description of the procedure of reserving material in catalogue.

Procedure

1. In the **Home library material** editor, click the **Catalogue** button for the selected member.

The **Catalogue** window will open.

2. Find the material (the procedure of finding the material is described in chapter 4.12.1).

3. Select the material for reservation.

Select the material from the list which has the most favourable status for the user (available, no restrictions for loan, etc.). If no copy of the material is available, select the bibliographic description of the material or one of unavailable copies of the material. For serials always select an individual volume of serials.

4. Click the **Reserve** button.

When selecting the volume of serials, after clicking the **Reserve** button, the **Select issues** window will open where you can select one or several issues.²

When selecting the bibliographic description for a multi-volume material a window will open where you must select which volume you wish to reserve. You must select the physical form of the material you wish to reserve even for multimedia.

When selecting the unit which cannot be reserved (after clicking the **Reserve** button, i.e. the **OK** button in the **Select issues** window), the programme will display an appropriate message. Close the window by clicking the **OK** button and return to the **Catalogue** window to the list of displayed results. If the reservation is successful, the **Catalogue** window will close and you will return to the **Home library material** window again. The reserved material will be added to the end of the list of recorded material for the member. Reservation validity expiry date is automatically calculated on the basis of reservation validity, i.e. reservation validity period of the available material defined in the time parameter table for that type of material (see. chapter 2.1).

If there are restrictions for the member or the material restricting or disabling the reservation, an appropriate warning will be displayed. In the following cases you can decide if you wish to reserve the material despite the restrictions:

- the member has already reached the maximum allowed number of reservations
- availability level (996/997p) is defined for the copy restricting the loan; it usually applies to availability level 4 – restricted availability – reading room, 5 – restricted availability – with author's permission or 6 – the contents of the document is not available
- status (996/997q) is defined for the copy restricting the loan; it usually applies to status 6 – damaged

The *material cannot be reserved* in the following cases:

- there is no field 996/997 with accession number for the material
- the material does not belong to the department or is not put on interdepartmental loan to the department in which you wish to put it on loan (applies to libraries in which loan is organised by departments)
- the library does not allow loan for that type of material (reservation validity period is not defined in the time parameter table)
- availability restriction is defined for the copy 0d (996/997u) restricting outside loan, reading room loan and reservation of the material
- the material is already on loan to a member or department
- the material is already reserved for a member or department

² For serials the expression "issue" designates one item for loan. It can be an individual issue (if the issues are not bound) or several issues bound together.

- availability level (996/997p) is defined for the copy restricting reading room loan; this usually applies to availability level 7 – completely inaccessible (archival copy)
- status (996/997q) is defined for the copy restricting reading room loan; this usually applies to status that is different from 6 – damaged
- the Reserve button is inactive as one of the restrictions which disable the reservation applies for the member (Entry denied, Internet access only, membership card retained)
- the Reserve button is inactive because the upper limit of total debts has been reached or the date of the oldest entered debts exceeded the time period restrictions that are taken into account are defined by setting up special parameters upon the library's request)

**Tip:**

Upon the library's request, a special parameter can be set up, where in the case of unsettled debts within a specific period, a note will be automatically displayed before the conditions for loan restrictions are activated.

4.13.1 Reservations of available material

Reservation of the material that is not recorded for any member or partner is called a reservation of available material. When reserving available material the selected *item for loan* is reserved. Reservation of available material is related to ID number of the copy, which is accession number for monographs; for serials in several issues, accession number is followed by the issue number, i.e. a range of issues numbers bound together.

The reserved copy is displayed at the end of the list of the material recorded for the member and has status *O*. Reservation validity expiry date is automatically calculated based on reservation validity period of the available copy which you defined for that type of material in time parameters table in the column *ord*. (see. chapter 2.1). During this period you usually do not lend this copy to other members. The period to which the reservation of available material applies is usually shorter than the period that applies to usual reservations.

The reserved material must be prepared for the member and the member who reserved it must be notified that the material can be collected. You can prepare a list of material ready to be collected by the **Process reservations** method in the **Unavailable material** class (see. chapter 4.13.3). The material from the list must be found and according to library's procedures marked as ready to be collected by the **Prepare reserved material for collection** method in the **Unavailable material** class. Then, you can notify the member who reserved the material about this. You will notify the member in a way which he/she chose from available options (e-mail, etc.) and you will place the material on the shelf for that purpose.



Note:

If you wish to be notified regularly about reservations of available material recorded by the members in COBISS/OPAC, you must enter e-mail address for receiving notifications on reservations (see chapter 2.5). In libraries with departments enter e-mail address to the data on department.



Note:

If you put on loan available material which is reserved for the member despite that, the reservation will be automatically changed to the reservation of unavailable material (status O is changed to status R), and the member will be placed on the first place of the list of reservations.

4.13.1.1 Preparing reserved material for collection

If you wish to record when the reserved available material is ready for collection, use the **Prepare reserved material for collection** method in the **Unavailable material** class. By using this method you will mark that the reserved available material (material with status *O*) is prepared for loan to the member who reserved the available copy or to the partner for whom the material was reserved through interlibrary loan. Before performing the procedure, a list of reserved available material must be prepared (the **Unavailable material / Process reservations** method) based on which you can search for the material on shelves and place it on the shelf where it will wait for the member who reserved it.

Precondition

The copy of the material has status *O*.

Procedure

1. Highlight the **Unavailable material** class and select the **Class / Prepare reserved material for collection** method.

The **Preparing the reserved material for collection** window will open where you will enter ID number of the copy.

2. If necessary (depending on a reader's settings) you will confirm the entry of ID number by clicking the **OK** button.

The **Preparing reserved material for collection** window will close.

Once the procedure is performed, the status *O* is changed to *W* for the reserved available material, the date of change is recorded and expiry date of the status *W* is calculated based on the period you defined for that type of material in the time parameter table in the column *wait*. (see chapter 2.1).



Tip:

In the same way you can highlight that the available material which was reserved for interlibrary loan is ready to be lent to the customer.

The library will inform the member about the preparation of the material for collection in accordance with the method of notification. When doing this you

will consider the method of notification the member chose (e-mail, SMS notification, telephone call). If the member is subscribed to notifications on available reserved material and entered his/her e-mail address or telephone number, an e-mail, i.e. SMS will be sent at that moment.

If the library does not charge the costs of notification on available reserved material (automatic calculation method of the service is defined in the price list for the item *14 – RES notif. about avail. material*) and the member is not subscribed to e-notifications, the programme will prompt you to calculate the debt for the costs of notification.

After that, place the copy of the material along with the slip containing data on reservation on the shelf for reserved material.



Note:

*If material is allocated for interlibrary loan and intended for a member, a notification on received reserved material will **not be sent** (by e-mail or SMS notification) to the member, even if the member is subscribed to e-notifications about received reserved material and has entered his/her e-mail address or a telephone number.*

4.13.1.2 Printing slip with reservation details

You can place the material on the shelf for the reserved material or material allocated for interlibrary loan with a slip which contains details on the member who reserved the material or details on interlibrary loan reservations. If the material is reserved for interlibrary loan, the customer details (partner symbol or member's name and surname) and the ILL request number will be displayed on the slip. The slip is printed on the printer that is used for printing lending forms or invoices. The slip with reservation details is printed automatically:

- when returning the reserved material to the library if you allocate the copy to the member
- when preparing the reserved available material for collection (see chapter 4.13.1.1)



Note:

At the library's request, automatic printing of the slip can be turned off with a special parameter.

Options

Slip with reservation details can be printed later, if the material, for example, has been allocated to the next member on the list of reservations due to reservation cancellation in the My library service via COBISS/OPAC. Find the reserved material by using member or partner details or data on the material and save it to the workspace. Right-click on it and select **Print** or **Send** from the menu and *Slip with reservation details* from the list of report definitions.

4.13.2 Reservations of unavailable material

Reservation of the material that is recorded for another member or partner is called reservation of unavailable material.

When reserving unavailable material **record ID number** is reserved for a monograph (i.e. COBISS.SI-ID) because you do not know which copy will be available first. If it is a multi-volume material, volume designation (996d\|x) is added to record ID number and the reservation is recorded as **COBISS.SI-ID,x**. For the material in different physical forms, physical form designation (code for physical form 996g\|o) is added and the reservation is recorded as **COBISS.SI-ID,g\|o**.

For serials, the selected **item for loan** is reserved. It can be the number of the individual issue (if the issues are not bound) or the range of numbers of issues bound together.

The reserved copy is displayed at the end of the list of the material recorded for the member and has status *R*. Reservation validity expiry date is automatically calculated based on reservation validity defined for that type of material in the time parameter table in the column *res*. (see chapter 2.1).

The member is placed on the list of reservations. You can check the position on the list of reservations by highlighting the reserved material and clicking the **View** button (see chapter 4.11). The member or partner who is on the top of the list will get the material first because he/she reserved it first or the material was reserved for the member through interlibrary loan.

The material is allocated to the member who is the first on the list of reservations if the following events are recorded for the member who has the material at that moment:

- return of the material
- deleting the reservation of available material (status *O* or *W*)
- cancellation of the reservation in the My library service

You can find a more detailed description of allocating material for interlibrary loan in the COBISS3/Interlibrary Loan software module in the COBISS3/Interlibrary Loan User Manual, see chapter 2.3.2.1.

Status of the material is changed from *R – reserved unavailable material* to *W – waiting (reserved)* in the records of the material for the member (the **Home library material** window) for whom the reservation is recorded.

The member will be informed that the material has been received in a way that is provided in the library for this purpose (e-mail, SMS notification, telephone call). If the member is subscribed to e-notifications about availability of the reserved material and if the member entered his/her e-mail, i.e. mobile phone number, e-mail, i.e. SMS notification will be sent at that moment. You can place the material on the shelf for available reserved material with the slip containing reservation details.

If the reserved material is allocated to that member due to deletion or cancellation of the reservation for other member, you must find the material and, if necessary, print the new slip with reservation details.

4.13.2.1 Editing a list of reservations

When reserving unavailable material the member is placed on the currently last place of the list of reservations. You can check the position on the list of reservations by highlighting the reserved material and clicking the **View** button (see chapter 4.11). The order of the members on the list of reservations is automatically changed in the following cases:

- when the reserved material is returned to the library and is allocated to the member or for interlibrary loan (status of the material is changed from *R – reserved unavailable materials* to *W – waiting on the shelf (reserved)*, other members on the list move up for one place
- when the material is lent to someone else and not to the member with the reservation of available material (status of the material was *W – waiting on the shelf (reserved)* or *O – reserved available material*) the member with the reservation is placed on the first place of the list of reservations
- when the reservations are deleted or cancelled, other members on the list of reservations are moved up for one place on the list of reservations

The order of members on the list of reservations can be edited *manually* by the **Change place of reservation** method. The method is available in the **Insight into library material status** window which opens when using the **View** method (see chapter 4.11).

Precondition

Conditions to change the place on the list of reservations are:

- privilege *LOAN_RES – Editing list of reservations*
- you came to the **Insight into library material status** window from the **Home library material** window for the member for whom you wish to change place of reservation

Procedure

1. In the **Insight into library material status** window click the **Change place of reservation** button.

The **Changing place of reservation** window will open where current place of the member on the list of reservations is displayed. If there is no list of reservations or there is only one member on it, a warning message will be displayed.

2. In "New place" enter the place on which you wish to place the member on the list of reservations.
3. Save the changes by clicking the **OK** button.

You will return to the **Insight into the library material status** window.

4.13.3 Processing reservations

In order to follow regularly new reservations of available material reserved by members via COBISS/OPAC or by a librarian at the member's request in the COBISS3/Loan software module, or on the basis of ILL requests, it is recommended to regularly prepare lists of new and cancelled reservations. It is useful to prepare the list at least once a day. On the basis of that list you will move the reserved material to the special place or transfer it to the interlibrary loan department, where it will wait for the member or partner who reserved or ordered the material. The material whose reservations were cancelled via COBISS/OPAC must be returned to the shelves or to closed stacks. In libraries that have loan organised by departments you must prepare the list for each department separately. In libraries that use the COBISS3/Interlibrary Loan software module, the material which was reserved for interlibrary loan will also be displayed on the list.



Tip:

You can create a list of reservations also by sublocations of the material. This is appropriate especially for libraries where loan is not organized by departments and material is in different locations. If a library decides to process reservations by sublocations of the material (i.e. element d/l in the call number), a code list for processing reservations (CODE 322) must be prepared. As a code symbol, enter the location symbol where the reservation will be processed. Under »Value«, enter the following values:

- in libraries with no departments

sublocation 1, sublocation 2,..., sublocation n

Example: Under "Code" enter: *Sk11*, under "Value" enter: *K,La,Mi*

- in libraries with departments

department number: sublocation 1, sublocation 2,..., sublocation n

Example: Under "Code" enter *Sk11*, under "Value" enter: *01:K,La,Mi*

- in libraries where the sublocation is not entered for every item

Define any code symbol, enter **blank** in Value

Example 1: Under "Code" enter *Centrala*, under "Value" enter *blank*

Example 2: Under "Code" enter *Sk11*, under "Vrednost" enter *K,blank*

If a code list of locations for processing reservations exists, when the method for processing reservations is activated, the drop-down list of reservations, as defined in this code list, will be displayed.

NOTE: If a library decides to process reservations by a code list of locations for processing reservations, it is important to include all sublocations to the code list. An option will be offered only for the sublocations entered in the code list.

In a library where loan is organized by departments, only reservations of the sublocations that belong to the same department can be included to the same location for processing reservations.

You can prepare:

- list of new reservations created during the period of the last creation of the list of new and cancelled reservations

The list of new reservations contains details on reserved available material (status *O*) in loan and interlibrary loan. Data on material is sorted by call numbers on the list.

- list of reservations cancelled via COBISS/OPAC

The list contains details on copies for which the reservation (material with statuses *O* and *W*) has been cancelled, details on the member who cancelled the reservation and data on the status of the copy after reservation cancellation.

- daily list of new reservations
- daily list of cancelled reservations
- lending forms for new reservations

Lending forms for the material on the list can be prepared when preparing the list. Lending forms are actually order forms sent to the closed stacks.

Procedure

1. Highlight the **Unavailable material** class and select the method **Class / Process reservations**.

The **Reservation processing** window will open displaying the date of the last creation of the list of reservations – it is the date and time when the list "new reservations and cancellations via COBISS/OPAC" was selected when processing the reservations.

2. Select the list that you wish to prepare by ticking the appropriate radio button:

- new reservations and cancellations in COBISS/OPAC which contains all new reservations (in the COBISS3/Loan module and via COBISS/OPAC) and cancellations via COBISS/OPAC since the last creation of the list; two lists are created
- daily list which contains all new reservations and cancellations via COBISS/OPAC on the present day; two lists are created

3. Use the check box to select if the list should include also:

- new reservations of unavailable material (material with status *R*)
- lending forms for reserved available material

The last selection in the check boxes is saved to user's settings, that's why it is not necessary to reselect the checkboxes during the next processing of reservations, unless you wish to change the settings.

4. Confirm the selection by clicking the **OK** button.

If the selected report(s) is/are successfully created, it will be sent to the printer. The created reports are automatically saved to the folder *Loan* and it is possible to print them later in the COBISS3/Reports module. In the folder *Loan* in the menu under **Creating reports** select **Browse stored reports**. The window containing the list of created reports will open. The name of the file contains date and time of report creation and in libraries with department department ID in which the report was created.



Note:

If the copy has status available on the list of cancelled reservations, the text "Back to the shelf" will be displayed next to member's details. The copy should be returned on the shelf or to the closed stacks.

If the material was allocated to the next member or partner on the list of reservations after the reservation was cancelled, details of that member or partner will be displayed. In this case, the copy is not returned on the shelf or to the closed stacks. The member to whom the material was allocated must be notified that the material waits in the library. If the library enables notification about available reserved material by e-mail or SMS notification and if that service is activated for the member, the member will receive an automatic notification.



Note:

If you wish to be regularly informed about reservations of available material recorded by the members via COBISS/OPAC, you must enter e-mail address for receiving notifications about reservations (see chapter 2.5).

4.13.4 Batch deletion of reservations whose validity period expired

When recording reservations the date until which the reservation is valid is determined on the basis of the reservation validity period for individual type of material entered to the time parameter table (see chapter 2.1). If the member does not collect the material until that date, the reservation is considered to be invalid. The reservations can be deleted several times a day. If the loan is organised separately by departments, reservations must be deleted separately in every department.

For batch deletion of reservations whose validity period expired use the method **Delete expired reservations** in the **Unavailable material** class.

Procedure

1. Highlight the **Unavailable material** class and select the **Class / Delete expired reservations** method.

The **Delete expired reservations** window will open.

2. Select the reservations that you wish to delete:

- W – waiting on the shelf (reserved)
- O – reserved available copy
- R – reserved unavailable copy

You can highlight several different reservations or all types of reservations.

3. Confirm the selection by clicking the **OK** button.

The **Overview and sending of created report** window will open where you can see or send to printer the list of deleted reservations. Since the report is automatically saved, it is possible to print it later from the COBISS3/Report module. In the folder *Loan highlight the List of deleted reservations* and in the menu **Creating reports** select the method **Browse stored reports**. The window containing the list of created reports will open. The name of the file contains date and time of report creation and in libraries with department department ID in which the report was created.

During the procedure of deletion the programme checks if the copies with deleted reservation are reserved by other members. If so, the material with status *W* or *O* is allocated to the next member on the list of reservations.



Note:

If the library notifies the members about reservations whose validity period expired, the members who selected the option for such notifications either by e-mail or by SMS notification (ticked check box "Notif. about reservation expiry") will also receive a notification about deleting the reservation of the material.



Note:

Interlibrary loan reservations will not be deleted when batch deleting reservations.



Tip:

When searching for the material on the shelf on the basis of the list of new reservations of available material, use the **Prepare reserved material for collection** method in the **Unavailable material** class (see chapter 4.13.1.1). By doing so you change the loan status from *O* to *W*.

4.13.5 Reserving material for reading room use

Some libraries allow the material to be borrowed and used only in the reading room. A library can reserve the desired material for reading room use for a specific period of time (e.g. 5 days). This means that the material is in the reading room and will wait for the member at a special place (on the shelf, in

the cupboard, etc.) and will not be available to other members. Within the specified period, a member can borrow the material to the reading room several times and then return it to the special place, where it will wait for him/her.

Precondition

General conditions for a reading room reservation are as follows:

- reservation can be recorded only for the member you previously selected
- reservation for department is not possible
- reservation of material is not possible if a copy is not accessible for loan
- reservation of material is not possible if a copy is not available for loan
- in libraries with departments, it is possible to record a reservation of a copy only in the department to which a copy belongs to or is on interdepartmental loan to that department

Procedure

1. In the **Home library material** editor, click the **Catalogue** button under the selected member.

The **Catalogue** window will open.

2. Find the material (the procedure of searching the catalogue is described in chapter 4.12.1).
3. Select the copy of the material for reading room reservation.

For serials, always select an individual volume of the serial and then select one or more issues in the **Select issues** window.

If no copy of the material is available, you can record a reservation of unavailable material.

4. Highlight the **Reading room** radio button and click the **Reserve** button.

After a successful reservation, the **Catalogue** window will close and the **Home library material** window will stay open. The reserved material will be added at the end of the list of recorded material under the member with status *U – reserved in reading room*. The reading room reservation expiry date will be automatically calculated based on the reading room reservation validity period that is defined for this type of material in the column *read.* in the time parameters table.



Note:

If there are restrictions for the member or the material restricting or disabling the reading room reservation, appropriate message will be displayed. You can decide whether you wish to reserve the material despite the restrictions in the following cases:

– the member has already reached the maximum allowed number of reservations

– *availability level (996/997p) is defined for the copy restricting the loan; it usually applies to availability level 5 – restricted availability – with author's permission or 6 – the contents of the document is not available*

– *status (996/997q) is defined for the copy restricting the loan; it usually applies to status 6 – damaged*



Note:

The material cannot be reserved for reading room in the following cases:

- *there is no field 996/997 with accession number for the material*
- *the material does not belong to the department or is not put on interdepartmental loan to the department in which you wish to put it on loan (applies to libraries in which loan is organised by departments)*
- *the library does not allow loan for that type of material (reservation validity period is not defined in the time parameter table)*
- *availability restriction is defined for the copy 0d (996/997u) restricting outside loan, reading room loan and reservation of the material*
- *the material is already on loan to the member*
- *the material is already reserved by the member*
- *availability level (996/997p) is defined for the copy restricting reading room loan; this usually applies to availability level 7 – completely inaccessible (archival copy)*
- *status (996/997q) is defined for the copy restricting reading room loan; this usually applies to a status that is different from 6 – damaged*
- *the **Reserve** button is inactive as one of the restrictions which disable the reservation applies for the member (Entry denied, Internet access only, Membership card retained)*

4.14 ROUTING LISTS FOR SERIALS

Upon the receipt of a new issue of a serial, some libraries send the new issue for routing among the employees of the institution that the library is part of. If you wish to specify the order of employees, in which they receive the issue of the serial, you can define the routing for that serial. Based on the routing details, you can then record the routing of the individual issues of the serial and prepare different lists to follow the routing order.

4.14.1 Setting up routing lists for serials

The routing list for serials is specified separately for each year (accession number).

Procedure

1. Select the **Routing lists** class, and then use the method **Class / New object**.

The **Field 996/997** search window will open.

2. Find and select the serial. (Note: You can only select one field 996/997 or one accession number!)

The **Routing lists** editor window will open.

If a routing list already exists for that accession number, a warning message will appear. If you wish to specify several routing lists for the same accession number (e.g. by departments of employment of the library members), click the **Yes** button to answer the question "Do you want a new list to be created?".

3. You can enter the following data:
 - Under "List ID", enter an ID of your choice (e.g. *Accounting*), if you want to specify several lists for the same accession number.
 - Under "To be forwarded within", enter the issue's routing period for each library member (e.g. 3 for 3 days).
 - Under "Note", enter a note.
 - Under "Type of routing", select the type of routing for the issue; the default value is set to *Copy returned to library at the end*, i.e. the value you selected during the last creation of the routing list.
 - Use the "Valid" radio button to indicate the list's validity; the default value is set to valid.
 - Use the **Members** tab to specify the list of members that participate in routing. Click the **Add** button to open the **Member** search window, and use it to find and select member.

To change the order of the library members on the list, click the Routing sequence button.

4. To save the data, click the **OK** button.



Note:

A routing list must be created for each field 996/997 individually. It is not possible to copy an existing routing list to a new field 996/997.

4.14.2 Deleting routing lists

Condition

A routing list can be deleted if there is no routing recorded for the accession number.

Procedure

1. Find the list in the **Routing lists** class.
2. Use the **Object / Delete routing list** method to delete the routing list.

4.14.3 Preparing a new routing list

When a new issue of a serial arrives to the library, you have to process it first (e.g. fill in subfield 997m). If you recorded the receipt of an issue with a manual entry to subfield 997m and a routing list already exists for that field 997, a warning message will appear when you exit the editor.

If you use **Serials check-in** to record the receipt of the new issue, the **Routing** editor window will appear once the subfield 997m is updated successfully and if a routing list for that serial already exists (see description below).



Note:

A routing list is the precondition for recording the routing of an issue. In case of an issue of a new year for which you have to add a new field 997, you have to specify a routing list for that accession number first.

Procedure

1. In the **Routing lists** class, find and select the routing list for the issue.
2. Select the **Object / Prepare new routing** method.

The **Routing** editor will open. The data you entered when specifying the routing list (accession number, list ID, note, list of members) will be transferred to this window. If you recorded the issue's receipt with the **Serials check-in**, the issue number will be displayed as well.

3. You can enter the following data:
 - Under "Due date" enter the estimated due date. The data is mandatory. If the type of routing is set to *Copy returned each time to library*, adequacy of the date is automatically checked depending on the routing

due date (for the member) and depending on the number of members on the routing list. If the due date is earlier than the date calculated by the formula *Routing starting date + (Due date (for the member) X number of members)*, a warning message will be displayed.

- Under "Issue number", select the issue after you open the **Select issue** window by clicking the **Select issue** button.
- Under "To be forwarded within", enter the number of days planned for each member.
- Under "Note" you can enter any note that will be included in the routing list.

To change the order of the library members on the list, click the Routing sequence button.

4. To save the data, click the **OK** button.

The routing details for the issue will be saved to your workspace.



Note:

The routing status for the issue is in preparation, because you can still edit the routing details.

4.14.4 Sending an issue for routing

An issue can be sent for routing in two different ways, depending on how your recorded its receipt. If the receipt was recorded manually, you have to use the **Send for routing** method after you create the routing.

Procedure

1. In the **Routing** class, find and select the routing for the issue and load it onto your workspace.
2. Select the **Object / Send for routing** method.

The following question will be displayed: "Do you wish to send the issue for routing and print out the list?"

3. If you click the **Yes** button, the issue is sent for routing:
 - the **Overview and sending of created report** window will open, where you can print out a list of members, subscribed to the serial; the list is routing with the issue itself
 - the issue with the status *K – routing* will be recorded for the first member from the routing list
 - the routing status will change automatically to *2 – routing*



Note:

An issue cannot be send for routing, if it is on loan, already routing or if its status or availability level is not permitting loan.

The procedure of sending the issue for routing itself is the same for routing with returning and for routing without returning to the library. The only difference concerns calculation of the due date: for routing with returning to the library the due date which applies to the member is taken into account while for routing without returning to the library the due date specified for that routing is taken into account.

4.14.5 Routing with returning each time to library

When sending to routing with returning each time to library every member always returns the issue to the library where you can lend the issue to the next member on the routing list after recording returning of the issue.

Procedure

1. Select the **Material on loan** class and select the **Class / Return, delete** method.

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

2. Enter ID number of the issue or use the reader to enter it.

The **Home library material** window will open for the member who borrowed that issue. The issue whose identification number you entered is already selected, the **Return** button is active, so returning of the material can be confirmed by pressing the <Enter> key.

3. The **Assign to routing** window will open where the next member on the routing list who will receive the issue is already selected.

If the member who returns the issue is the last on the list, no member is selected.

4. Confirm or change the selection of the member.

The issue is recorded (as put on loan) for routing for the selected member. If you selected no member, the routing is closed and issue will get the status available.

4.14.6 Recording the end of routing

To record the end of routing, delete the issue from the member's material records once it is returned. Routing with returning each time to library is finished when the issues returned by the member from the list is not sent to further routing.

Procedure

1. Highlight the **Material on loan** class and select the **Class / Return, delete** method.

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

2. Enter ID number of the issue or use the reader to enter it.

The **Home library material** window will open for the member who borrowed that issue. The issue whose identification number you entered is already selected, the **Return** button is active, so returning of the material can be confirmed by pressing the <Enter> key.

For routing with returning each time to library the **Assign to routing** window will open. If you wish to close the routing, do not select any member from the list.

3. To close the **Home library material** window, click the **Close** button, or press the <Esc> key.

The routing status will change automatically to *0 – closed*.

Options...

You can also record the end of routing in one of the following ways:

- find the member, for whom the material is recorded (e.g. from the **Members** relationship), and then record the return within the **Home library material** window,
- find the issue in the **Material on loan** class and use the method **Object / Return, delete** on your workspace.

If you have several separate lists of members for the same accession number, check if the issue routed through all the lists. The procedure is as follows:

Procedure

1. In the **Routing lists** class, find and select all lists for the given accession number.
2. Select an individual list and use the Show button to open the **Viewing – Routing lists** window, where you can see from the relationships whether the given issue already routed through the list or not.
3. Select a list that the issue hasn't routed yet. Once it loads onto the workspace, send the issue for routing.
4. If the issue finished routing through all the lists, it can be returned to the shelf.

4.14.7 Cancelling routing

Condition

To cancel the routing of an issue, you can use the method for deletion, if the routing status is *1 – in preparation* or *0 – closed*.

Procedure

1. In the **Routing** class, select the method **Search**.
Find and select the routing.
2. Use the **Object / Delete routing** method to delete the routing.



Note:

If the issue already started routing and you wish to cancel the routing, you have to record the end of routing, and then use the method for deleting routing.

4.14.8 Routing lists and notifications about routing period expiry dates

You can prepare routing lists for the member, a routing list for serials and notifications for the member about the routing period due date.

Routing lists for members

Procedure

1. In the **Member** class, find and select the member and save the member to the workspace.
2. Use the method **Object / Show routing details for the member**.

Routing lists for serials

Procedure

1. In the **Routing lists** class, use the method **Send**.
2. Find and select one, more or all serials.
3. In the **Report definition selection** window, select *Routing details for serials*.

Notifications about routing period expiry dates

Procedure

1. In the **Member** class, use the method **Send notif. about routing period expiry date**.
2. A notification will be sent by e-mail to the **business** e-mail address of the member who currently has the issue in routing.

4.15 ENTERING LOSS OF MATERIAL

Use the procedure when you wish to enter the loss of the material that you still wish to keep in the member's records until the payment method for the lost material is agreed upon with the member.

Precondition

Only copies that were on outside loan or reading room loan can be entered as lost (status *C* or *S*).



Note:

For material that is put on loan as a set, enter the loss of individual set items or of the complete set in the way that is described in chapter 4.16.

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 the membership card number or by some other data (see chapter 4.1).

The **Home library material** window will open.

3. Find the copy in the list of entered material and double-click the status *C* or *S* (1st column).

The **Status selection** window will open.

4. In the window, select the status *LOST* and click **OK**.

The status of the entered material will change from *C* or *S* to *L – lost*. When calculating the status *L* expiration date, the time parameter *res.* (status *R*) will be taken into account.

The date of entering the loss is entered under “Date of loss”, which will be displayed in the 1st row of the 6th column.

When entering the lost item, the number of lost items will be automatically increased under the data on the member conduct under “Lost material (LOAN)”, and in the **Home library material** window, the note indicator *LST* will be displayed in the upper right corner of the screen.

If the loan period for the material has already expired and the library charges a fine for this type of material, you can enter debts for the fine.

If the material is reserved for another member, the material will **not** be allocated to this member when entering the loss.

On the lending form, the material that was entered as lost will be displayed in a special table.

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

If a member after a certain period of time finds the item and returns it to the library, debts can be cleared for the member by putting the item on loan first and returning it after that.

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 the membership card number or some other data (see chapter 4.1).

The **home library material** window will open.

3. Find the copy on the list of entered material and double-click the status *C* or *S* (1st column).

The **Status selection** window will open.

4. In the window, select the status *LOST* and click **OK**.

The status of the entered material will change from *L – lost* to *C – outside loan*.

5. Return the item by clicking the **Return** button.

The number of lost items under the member details will be decreased by one item.

If a member does not find and return the lost material after some time, the lost item will be deleted from the member's records.

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 the membership card number or by some other data (see chapter 4.1).

The **Home library material** window will open.

3. Highlight the lost item (status *L*) and click **Return**.

The **Lost material** window will be displayed.

4. If you wish to highlight the item as lost and disable the loan, select the item and click **OK**.

To the holdings data under “Status” (subfield 996q), value 8 – *lost* is entered, and under “Loan restriction” (subfield 996u), *Od* is entered.

**Note:**

*If you click **Cancel** in the **Lost material** window, you must manually mark that this is a lost item in the holdings data; if not, the status Available will be displayed for this item, which is incorrect.*

If the material is reserved, when deleting the lost item from the member's records, it will be automatically checked whether there are any items without restriction available for loan.

- If an item without restriction **exists** and is **on loan**, the reservation entered for the member will not be deleted.
- If a copy without restrictions **exists** and is **available**, the reservation (status *R*) will be automatically deleted, and the reservation for the available material (status *O*) will be entered.

A notification with data on the member who has reserved the material and a notification about changing the reservation will be displayed.

- If an item without restrictions **does not exist**, the reservation will be automatically deleted.

If there are several members on the list of reservations for this material, the reservation will be deleted for all members and a note about this will be displayed at the same time.

Options

Debts for the lost material are entered manually for the member.

The number of lost copies for the member will not change; for this reason, the note indicator *LST* will still be displayed in the **Home library material** window. If you wish that the indicator is not displayed for the member, delete the number of lost copies under "Lost material (LOAN)" in the **Member** editor.

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 *Od* 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)* from 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 *Od* (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 *Od* 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 *Od* 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 *returned*. 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 *Od* 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.

Procedure

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.

4.17 LOAN IN MOBILE LIBRARY

The COBISS3/Loan software enables automated loan procedures in the mobile library department in the area of the mobile library route, where the quality and strength of signal allows procedures to be performed effectively in the COBISS3 software. The COBISS3/Loan software can only be accessed online.



Tip:

As online connection is probably not available at all mobile library stops at all times, application for entering loan procedures during this time is available and you can subsequently make adjustments with the local library database (see chapter 4.17.4).

As the majority of loan procedures in the mobile library is the same as in libraries, this chapter contains only those procedures that are performed in the mobile library only (e.g. selection of mobile library stop, material arrangement in the mobile library, setting up special loan parameters, etc.).

4.17.1 Special settings

In libraries with departments you can highlight an individual mobile library department by entering the number of mobile libraries under “Number of mobile libraries” in the editor with data on the mobile library department. As libraries usually have only one mobile library department, enter number 1. When you highlight the mobile library department, methods for entering material transfer to and from the library become available, and controls related to the mobile library procedures are activated at the same time.

As the mobile library stops periodically at individual mobile library stops, time parameters for loan and opening times calendar must be set up accordingly. To set up time parameters for loan and opening times calendar, find the mobile library department, transfer it to the workspace and use the method **Department / Time parameters** or **Department / Calendar**.

4.17.2 Selecting mobile library stop

Before the mobile library starts operating, a mobile library stop must be selected. When you do that, all loan transactions that were carried out at the mobile library stop will be entered for the selected mobile library stop location.

**Tip:**

A list of mobile library stops is maintained in the local code list *Mobile library stop (CODE 311)*. Two-digit codes and mobile library stop names are entered to the code list. Under the code 99, it is recommended to enter *Permanent mobile library stop* which is normally selected when transferring material to and from the mobile library.

When you log in to the mobile library department, a window with a list of mobile library stops will open. When you confirm the selected mobile library stop, data on the selected mobile library stop will be displayed after data on the login department in the title bar.

**Tip:**

If it is already defined under your username that when you log in you are automatically logged in to the mobile library department, an automatic notification will appear when you enter the first loan transaction reminding you that you have to select the mobile library stop before you start.

If you wish to change the mobile library stop, you can do this in the following two ways:

- in the **Home library material** window, select the relevant mobile library stop from the drop-down list for the selected member
- use one of the ways of transitioning to another department (e.g. **Department / Transition to another department**) and select the mobile library department again

4.17.3 Entering material transfer to and from mobile library

Due to shortage of space, a mobile library holds only part of the mobile library material; the rest of the material is in the mobile library closed stacks or in other library departments. In order for the actual material availability at the mobile library to be displayed, each item transferred from the parent library department to the mobile library must be entered. When the material is returned to the parent library, it must be removed from the mobile library records.

4.17.3.1 Entering material delivered from library to mobile library

Use this procedure when material is delivered from the closed stacks or other parent library departments.

**Note:**

Material that was not entered as delivered to the mobile library cannot be put on loan in the mobile library. Such material can only be reserved.

Conditions

You can enter delivery for material:

- that has a designation of mobile library sublocation (in element 1 of subfield 996/997d or in element E of subfield 996/997e) or was on interdepartmental loan to the mobile library department
- that is available or reserved (status *O*)
- that was not yet entered as delivered to mobile library
- that is available for loan

Procedure

1. Log in to the mobile library department.
A window with a list of mobile library stops will open.
2. Select *permanent mobile library stop*.
3. In the **Department** class, find the mobile library department and load it to the workspace.
4. Highlight the department and select the **Transfer material to or from mobile library** method.

The **Enter material transfer to or from mobile library** window will open. In the window, the radio button for entering delivery of material to mobile library is selected as default.

5. Enter the item identification number (accession number or loan number).

The item is loaded to the workspace; at the same time you are returned to the **Enter material transfer to or from mobile library** window, where you continue with entry procedures.

If material is a serial with several issues and you entered only accession number without issue designation, the **Select issue** window will open, where an individual issue can be selected. If you wish to enter delivery of several issues of the same volume, you must repeat the procedure for each issue.

If material is reserved or is waiting for a member, a notification will be displayed, and you have to place the material to the appropriate place in the mobile library.

**Tip:**

Material that is located in the mobile library can be found in the **Field 996/997** search window. Under “Mobile library No.”, enter the number of the mobile library (usually 1) and click the **Find** button. In the same way you can search for material in the **Catalogue** window if you would like to see information on the loan status of the material.

Information about the material being located in the mobile library will be displayed in the **Insight into the library material status** window if you use the **View** method, and in the **Catalogue** window within the loan status report.

4.17.3.2 Deleting material from the mobile library records

Use the procedure when you want to return material from the mobile library to the closed stacks or to other parent library departments.



Note:

Material that was deleted from the records in this way can no longer be put on loan in the mobile library.

Conditions

You can enter deletion from the mobile library material records for:

- material that was previously marked to be located in the mobile library
- available material

Procedure

1. Log in to the mobile library department.
A window with the list of mobile library stops will open.
2. Select *permanent mobile library stop*.
3. In the **Department** class, find the mobile library department and load it to the workspace.
4. Highlight the department and select the **Enter material transfer to and from mobile library** method.

The **Enter material transfer to and from mobile library** window will open. In the window, the radio button for entering delivery of material to the mobile library is selected as default.

5. Select the **transfer from mobile library** button.
6. Enter the item identification number (accession number or loan number).

The item is loaded to the workspace; at the same time you are returned to the **Enter material transfer to and from mobile library** window, where you continue with the entry procedure.

If a copy is not located in the mobile library or if it is still entered for the member, a notification will be displayed.

4.17.4 Entering loan procedures when working online in COBISS3/Loan is not possible

If the quality and strength of signal do not allow effective work with the COBISS3 software, loan procedures, return of material and loan renewals are entered in the **Offline COBISS/Loan in mobile library** application. Before you start working in the COBISS3/Loan, the application must be installed to your computer in the mobile library.

You can install the application by selecting the **Class / Install offline application in mobile library** method in the **Department** class. In the **Offline COBISS/Loan in mobile library** window, select the folder to which you wish to save the application. The folder *C:\Users\<username>\busC3Loan* is already set as default. At the same time, the application shortcut will be created on the desktop. As a rule, the application is installed only once.

When you are at the mobile library stop and you establish that you cannot work online in the COBISS3/Loan software module, activate the shortcut on your desktop and run the **Offline COBISS/Loan in mobile library** application. In the **Login to offline COBISS/Loan in mobile library** window, enter your username and click the **OK** button.

4.17.4.1 User settings

In the menu, select the **System / Settings** option. The **User settings** window will open, containing the following tabs:

- **User**, where you define the name and surname of the username you use to login to the application
- **User interface**, where you select the font, font colour and font size
- **Lending form**, where you select whether a window for selecting printer settings should open, enter the name of the person who will sign the lending form (e.g. *Librarian*) and greetings (e.g. *Thank you for visiting our library! We look forward to seeing you again soon.*)

Save the settings by clicking the **OK** button, or cancel the settings by clicking the **Cancel** button.

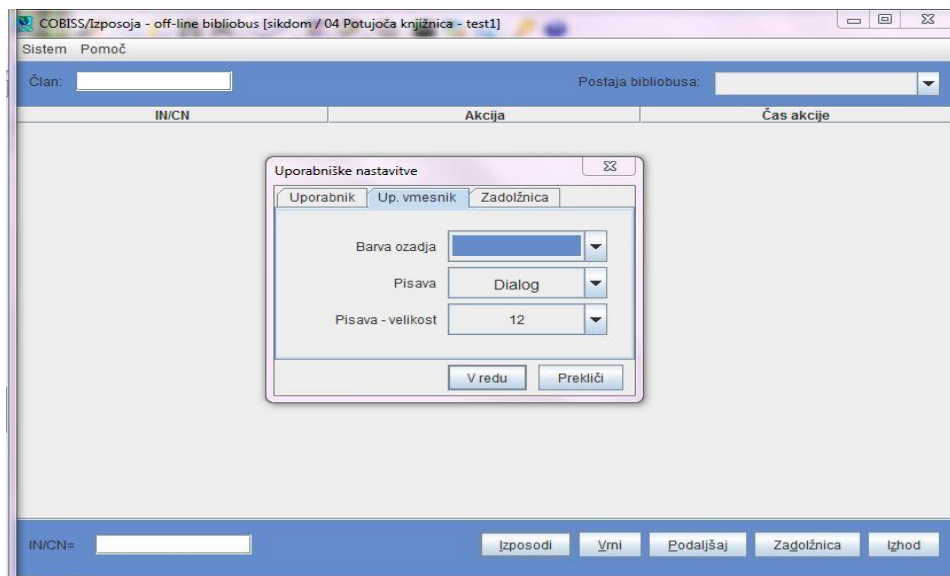


Figure 4.17 - 1: User interface settings

4.17.4.2 Entering loan procedures

The following loan procedures can be performed:

- loan of material
- return of material
- loan renewal
- printing lending forms



Note:

In the application you cannot enter new members, change member details, etc., as the application is not connected with the COBISS3/Loan software module and is intended only for entering the most common loan procedures, which are transferred to the COBISS3/Loan software module at a later time.

Use the application only when you cannot work online in the COBISS3/Loan software module.

Figure 4.17 - 2: Basic user interface window

Before you start entering loan procedures, select a mobile library stop from the drop-down list under “Mobile library stop”. Next, under “Member”, enter (manually or with a barcode reader) the membership card number of the member for whom you wish to enter one of the possible transactions. Under “AN/LN”, enter the accession number of the item that you wish to enter for the member. Depending on what you wish to do with the material, click one of the following buttons: **Lend, Return, Renew, Lending form**. If you wish to renew the loan period for all the items entered for the member, enter only the membership card number, and leave “AL/LN” empty.



Note:

For serials with several issues, the entire identification number of the item ((<accession number>, <issue number>) must be entered. If there is only accession number on the label, identification number must be entered manually; if not, the transaction will not be transferred.



Note:

When entering member’s identification number and item’s accession number, be precise as the programme does not check if the entry is correct. Possible mistakes will be detected only in the procedure of transferring data into COBISS3/Loan. Later on, it will be more difficult to detect incorrect entries for members or material.

When you enter accession numbers with a barcode reader, select the procedure you will perform for the member before you read the barcode.

**Tip:**

If you wish to cancel the entered transaction, you can delete it by clicking the right mouse button to highlight the transaction and then clicking the **Delete** button that appears in the screen tip.

**Tip:**

If you wish to delete contents under “Member”, “Mobile library stop” and “AN/LN”, click the **Clear all** button.

When you finish entering loan for a member and continue the procedure for the next member, first enter the identification number of the next member under “Member” and then start entering loan procedures.

The screenshot shows the 'Offline COBISS/Izposoja v bibliobusu' window. At the top, there's a menu bar with 'Sistem' and 'Pomoč'. Below it, a form contains 'Član: 0300543' and a dropdown for 'Postajališče bibliobusa: Brezje'. The main area is a table with three columns: 'IN/CN', 'Akcija', and 'Čas akcije'. It lists four transactions. At the bottom, there's a form for 'IN/CN=' and several buttons: 'Počisti vse', 'Izposodi', 'Vrni', 'Podaljšaj', 'Zagolžnica', and 'Izhod'.

IN/CN	Akcija	Čas akcije
032012099	11 - izposoja na dom	09.10.2014 16:14:22
032012654	11 - izposoja na dom	09.10.2014 16:14:33
032012090	17 - vračilo gradiva	09.10.2014 16:15:20
032014544	16 - podaljšanje roka izposoje	09.10.2014 16:15:31

Figure 4.17 - 3: Entered loan procedures for a member

After loan of material, return of material or loan period renewal, you can print a lending form for the selected member. To do this, click the **Lending form** button. On the lending form, the following data will be displayed:

- library name and department
- date and time of issuing the lending form
- membership card number of the member for whom procedures with material were entered
- procedure that was carried out for the item of material (Unavailable material for the loan of material, Returned material for the return of material and Loan period renewal for renewing loan period), and accession number or loan number used for the procedure
- data on the person who lent the material

- greetings



Note:

*Specific member details (e.g. name and surname) and data on the material (e.g. author, address, etc.) are not displayed on the lending form as there is no connection between the **Offline COBISS/Loan in mobile library** application and the COBISS3/Loan software module.*

When you finish entering loan procedures at the mobile library stop, close the application by clicking the **Close** button. At the next stop, where you will have to enter loan procedures via the **Offline COBISS/Loan in mobile library** application, open the application again, select the relevant mobile library stop from the drop-down list under “Mobile library stop” and start entering loan procedures.

4.17.4.3 Transferring entered transactions to the COBISS3/Loan software module

When you come to the mobile library stop, where you can enter loan procedures online, all transactions that were entered in the **Offline COBISS/Loan in mobile library** application will be transferred to the COBISS3/Loan software module.



Note:

*Transactions that were carried out in the **Offline COBISS/Loan in mobile library** application must be transferred to the COBISS3/Loan software module **at the first mobile library stop where you can work online**. It should be noted that members could lend the material, which was returned by members at the previous mobile library stop where procedures could not be performed online, at the next mobile library stops. If return of material that was returned at the mobile library stop where procedures could not be performed online was not transferred to the COBISS3/Loan software module, these items will not be available for loan.*



Note:

*Before you start transferring transactions, it is recommended that you log out from the **Offline COBISS/Loan in mobile library** application, and log in to the mobile library department in the COBISS3/Loan software module.*

In the COBISS3/Loan software module, highlight the **Department** class and select the **Class / Transfer transactions from offline application in mobile library** method, which enables entering all transferred transactions to the COBISS3/Loan software module.

If a transaction was not successfully transferred (e.g. membership card number of the member for whom the transaction was entered in the **Offline**

COBISS/Loan in mobile library application does not exist, the loan period was not renewed, etc.), the corresponding message will be displayed.

If you want to view detailed data on the transferred transactions, you can do this in the **Offline COBISS/Loan in mobile library** application. In the menu, select **System /View messages on the transfer of offline transactions**. The **Transfer offline transactions** window with a list of files with messages will open. The file name contains the date and time of the performed transfer (e.g. 10.09.2014 10:53:45). When you click on an individual line, a file will open in the editor, which is set to open txt. files by default. The following data will be displayed:

- date and time of transaction
- action performed on the basis of the transferred transaction
- member's membership card number
- accession number
- transfer status
- additional data on restrictions for the material or member.

When *OK* is displayed in the "Transfer" column, the transferred transaction is successfully entered. If *NOT OK* is displayed under status for an individual transaction, the transaction was not successfully entered. The reason for the unsuccessful transfer of the transaction is displayed in the "Action" column.

The second option for viewing detailed data on the transferred offline transactions is available also in the COBISS3/Loan software module.

Procedure

1. In the **Department** class, select the **View messages on the transfer of offline transactions** method.

The **Transfer offline transactions** window will open.

2. In the *From* and *To* entry fields, enter the period of viewing messages on the transfer of offline transactions and confirm by clicking the **OK** button.
3. Select one or more files that are visible in the form of a timestamp and confirm by clicking the **OK** button.

A file will open in the editor, which is set to open txt. files by default. If you select several files to view messages on the transfer of offline transactions at the same time, only one file will open, where all messages are displayed in individual sets, separated by a transverse line, according to the transfer of offline transactions.

5 COUNTERS

When entering new library members, you can allocate a new membership card number by using the automatic counter which offers you the first available membership card number in relation to the last number allocated by the automatic counter. If there is an error in the counter (incorrect number in "Search from"), you can set the counter manually. To set up the counter manually, the privilege *LOAN_OPER – Setting lowest counter value* is required.

In libraries with departments which keep records on members separately by departments the counter must be set up for each department separately.

Procedure

1. In the **Counters** class, find and select the counter.

Since the class only contains one object (the counter), you can load it onto your workspace by double-clicking the **Counters** class.

2. Select the **Object / Edit** method.

The **Counters** editor will open.

3. Under "Counter for "Search from"", enter the desired number.

4. Save the changes.

The number you entered will be displayed under "Search from" next time you enter a new library member.



Note:

Counter changes are only used in those libraries, in which the membership card number for new library members is allocated by using an automatic counter.

6 SETTING UP THE DATE OF PROCEDURES

If you cannot record loan-related transactions automatically on a certain day (e.g. due to a computer failure), you have the option of doing it later by setting the date when the procedures should be performed.

Procedure

1. Select the **System / Settings / Set date for loan procedures** method.
The **Date of procedures** window will open.
2. Under "Date of procedures", enter the desired date.
3. Save the changes.

The date set up in such a way will be displayed in red in the **Home library material** window and will be taken into account when entering transactions under your username, until you change it or until you log in to the COBISS3 software again. The date will be taken into account when you register new members, edit member details, renew loan periods, change the due date, reserve the material, return or delete the material from member's records, automatically enter debts for fine or member's fee, return with restriction and record the loss of material.



Note:

The date must be before the current date.



Note:

The date set up in such a way will not influence the date of the member's last visit; the current date is always entered as the date of the last visit.

7 CASH REGISTER OPERATIONS

The chapter describes cash register operations in the COBISS3/Loan module.

Subchapters:

- Managing price list
 - Entering debts
 - Settling debts and printing invoices
 - Overview of debts
 - Deleting debts
 - Cancelling debt settlement
 - Repayment (credit note)
 - Closing out cash register and printin list of invoices
 - Overview of cash register transactions
 - Fiscal verification of invoices
 - Displaying data on issued invoices
- |

7.1 MANAGING PRICE LIST

If you charge library services to library members, you will define the price list. You can enter, edit or delete the price list in the **Price list** class. Charging of services is based on currently valid price list, except for charging fines for which prices from the price lists which were valid at the time of delay are also taken into account.



Note:

To manage price lists, the privilege CRO_PL – Price list management is required.

7.1.1 Entering price list

When you create a new price list, you can copy the valid price list or an archived price list (see chapter 7.1.1.3). You can also create a new price list without transferring data.

In libraries where loan is organized by departments, the same price list can be applied to all departments or every department can have its own price list. If the price list is different only in some departments, first create a price list that is applicable to the Home library and then create separate price lists for departments where the price list will be different.



Tip:

If the same price list is applicable to all departments and the library does not charge for any services in the department, create a price list with no items for this department.

You can enter and save the price list in the **Price list** class. The price list can have the following statuses: *in preparation*, *valid* or *archived*.

Procedure

1. Highlight the **Price list** class and select the **Class / New object** method.

In libraries with departments, the **Validity** window will open. In libraries without departments, continue the procedure with step 4.

2. Define price list validity.

You can select:

- "Home library" – if a library has no departments or the same price list is applicable to all or several departments
- "Department" – select the department for which you wish to create the price list from the drop-down list

If the parameter for separate price lists by departments is set up, you can select only one of the departments.

3. Click the **OK** button. The **Price list** editor will open.

The data in "Valid from" and "Valid to" are defined by the method for defining price list validity, therefore, you cannot access them in this editor.

4. Select the desired group of services or debts on the tab (see chapter 7.1.1.1) and click the **New object** button.
5. Enter the data (see chapter 7.1.1.2).
6. Save the data.

Price list status upon creation

Price list

- *in preparation*



Tip:

If a library wishes the uniform price list to be applicable to the department with the valid price list, a request must be sent to IZUM.



Note:

If in a library with departments you change the price list validity so that in an individual department, instead of a uniform price list, a price list for this department will be valid, starting from a specified date, it will not be taken into account when calculating the fine for the period in which no archived price list for this department exists.

7.1.1.1 Selecting group of services or debts

You can select one of the following groups of services or debt on tabs:

- Services/debts – member category (LOAN)

This group contains price classes related to member category. You will select the group if you wish to enter the price for membership fee or admission fee or the price for new membership card.

- Services/debts – type of material (LOAN)

This group contains price classes related to type of material. You will select the group if you wish to enter the price for lending fee or fee for the use of material, outside loan overdue fine or reading room overdue fine. You will enter the price for overdue notice to this group, if you charge the costs for overdue notices for every copy separately.

- Services/debts – unit (LOAN)

You will enter the prices for overdue notices (if you charge the costs for each overdue notice regardless of the number of units on the

overdue notice), for notification about available reserved material and for reservation of available copies to this group.

- Services/debts – other (LOAN)

This group contains prices for services that are not related to price classes, e.g. prices for photocopies, lost material, etc. If a library uses the COBISS3/Interlibrary Loan software module, a special service for interlibrary loan must also be entered to this group (see chapter 7.1.1.2).

- Services/debts (ILL)

You will enter prices for interlibrary loan services to this group. The procedure is described in the *COBISS3/Interlibrary Loan User Manual* (see chapter 11.3).

7.1.1.2 Entering and editing services or debts

Procedure

1. To enter new service or debt, click the **New object** button.

The **Service/debt – group** editor will open.

2. Select the service or debt from the code list.

You can select among those types of services or debts that are available according to the selected group.

3. Select the price class from the code list.

The price class depends on which group of services or debts you selected. For some types of services or debts the price classes are related to member category (e.g. membership fee) or to type of material (e.g. overdue fine). In the **Services/debts – unit (LOAN)** group you cannot select the price class. In the **Services/debts – other (LOAN)** group you can specify the price class yourself, but the price list code cannot contain more than three digits.

4. "Service/debts code" is automatically configured from the code for the type of service or debt and from the price list code.

5. "Description" is automatically configured from the value in "Type of service/debts" and from the value in "Price class".

The description is intended to facilitate identification of the code for the service or debt in the reports and can be edited or modified.

6. Enter the data for price calculation in "Unit of measure", "Price per unit", "Tax rate" and "Discount rate". If you the price per unit is not defined, you must enter it when you record the debts manually.



Note:

If you wish to enter debts automatically, you should define the price per unit.

Under "Amount", the total amount is automatically calculated according to entered data.

7. If you selected *exempt from VAT* under “Tax rate”, you must select the appropriate clause under “Exemption clause” from the local code list. The selected clause will be displayed in the summary section of the invoice together with the amount to which the VAT exemption applies.



Note:

The exemption clause can be entered if you previously defined the local code list VAT exemption clause (CODE 323). It is recommended that the clause code has one digit.

8. Select whether the debt will be recorded automatically or manually from the drop-down list in "Calculation method".

Manual debt entry means that you will record the debt on the basis of the price from the price list and manual entry of the number of units.

Automatic debt entry means that debts can be calculated and recorded when performing the procedure. In that way it is possible to record debts for admission or membership fee when registering new members or when the member whose membership expired visits the library. Debts for an overdue fine can be automatically recorded when returning the material or renewing loan period for the material whose loan period expired. If you select automatic calculation under the type of service or debts for which the calculation method is not available, a warning message will be displayed.

9. In "Note" enter the text of the note for internal use.
10. Click the **OK** button.
11. To enter new service or debt, repeat the procedure from step 1 to 9.
12. If you wish to *edit* the service or debt in the price list, highlight it and click the **Edit** button.
13. If you wish to *delete* the service or debt from the price list, highlight it and click the **Delete** button.



Note:

*If a library uses the COBISS3/Interlibrary Loan software module you must enter the service OTHILL in the price list under the **Services/debts – other (LOAN)** tab. Under »Type of service/debts«, select 99 – OTH; under »Price class«, enter the ILL designation. The price is not defined but you can enter the usual price that you charge for delivering items via interlibrary loan. Under »Tax rate«, select the value exempt from VAT; under »Exemption clause«, select the value manually.*

In libraries with departments define the service OTHILL in the price list that applies to the ILL department (i.e. the uniform price list valid for all departments, or a separate price list of the ILL department).

Options

Open the folder **Service/debts – group** in the list of objects related to the price list and select the service/debt you wish to edit from the list. After that select the **Object / Edit** method.

7.1.1.3 Copying to prepared price list

You can create a new price list by finding and selecting the valid price list or an archived price list and by copying it.

Precondition

The price list has status *valid* or *archived*.

Procedure

1. In the **Price list** class find and select the price list.
2. Select the **Object / Copy to prepared price list** method.
3. In libraries with departments, the **Validity** window will open.

You can select one of the following:

- “Home library” – if the same price list is applicable to all or several departments
- “Department” – if you are creating a price list for a specific department, select it from the drop-down list

All defined groups of services and debts will be transferred from the copied price list to the new price list. The values "Valid from" and "Valid to" will not be copied.

Status of the new price list after

Price list

- *in preparation*

7.1.2 Editing price list

You can define, edit and delete groups of services and debts for the price list in preparation. The data is changed in the **Price list** editor.

Precondition

The price list has status *in preparation*.

Procedure

1. In the **Price list** class find and select the price list.
2. Select the **Object / Edit** method. The **Price list** method editor will open.
3. Edit the data (see chapter 7.1.1.1 and chapter 7.1.1.2).
4. Save the data.

Options

You can edit the pricelist by opening the folder **Service/debt – group** in the list of objects related to the price list and by selecting the service or debt you wish to edit from the list. After that select the **Object / Edit** method.

7.1.3 Defining price list validity

The price list in preparation can be defined as valid at any time.

Precondition *Status of the price list is in preparation.*

Procedure

1. Find and select the price list.
2. Select the **Object / Define the price list as valid** method.

The current date is entered in "valid from" for the selected price list and its status is changed. The price list which was so far in preparation becomes valid, while previously valid price list is archived. At the same time the date that is one day earlier than the current date is entered in "Valid to" for previously valid price list. Status of previously valid price list is also changed.

Status after defining validity

Price list in preparation

- *valid*

Previously valid price list

- *archived*



Tip:

If you wish to view currently valid price list, select the **Price list** class and the **Class / Load active price list** method.



Tip:

If you wish to print the price list with all groups of services and debts on a printer, first find the price list and in the **Price list** class use the **Object / Print** method.

7.1.4 Deleting price list

You can delete any price list with status *in preparation* from the database.

Precondition

Status of the price list is *in preparation*.

Procedure

1. Find and select the price list.
2. Select the **Object / Delete** method.

7.2 ENTERING DEBTS

If you charge library members for some library services, you can enter the debt manually or automatically when performing the procedure. The precondition is that the price list is defined prior to this except when charging services for interlibrary loan (see chapter 7.1).

7.2.1 Entering debts manually

When you wish to enter debts for which automatic procedure is not provided, you must do it manually. Debts can be entered for library members only.

Procedure

1. In the **Member** class, find and select the member.
2. Select the **Object / Entering and settling debts** method.
3. The **Entering and settling debts** window will open.
4. Click the **Enter debts** button.
5. The **Debts entry – select service/debts** window will open.

All services and debts will be displayed on the list. In libraries with departments in which different price lists apply the price list of the department to which you are logged in as a user will be displayed. In the drop-down list in "Type of service/debt" you can limit the list to individual group (e.g. *FIN fine*).

6. Select the service/debt from the list and click the **OK** button.
7. The **Entered debts** window will open.

Data on the selected service or debt will be displayed from the price list in individual fields. If necessary, you can edit the data in "Price per unit", "Tax group", "Number of units" and "Discount rate". Discount rate must be entered as integer number, e.g. 50 for 50 per cent discount. The debts amount is calculated on the basis of this data. You can enter additional description under "Properties" and a note under "Note".

8. Confirm the amount of the entered debts by clicking the **OK** button.

Entered debts will be added to the list of debts, at the same time the amount of the entered debts will be added to the total amount of debts for the member.




Note:

Members' debts for interlibrary loan services are recorded in interlibrary loan (see COBISS3/Interlibrary Loan User Manual, chapter 5.12).

What to do next

Enter debt settlement (see chapter 7.3).

**Tip:**

You can access the **Entering and settling debts** window from the **Home library material** window by clicking the icon  next to the text Debts.

7.2.2 Entering debts automatically

Debts related to some procedures (e.g. fine when returning the material) can be entered automatically.

Currently it is possible to enter automatically:

- membership fee or admission fee when entering a new member (Member / New object), when editing member's details (Member / Edit) and when accessing the window with records on material (Member / Home library material) of the member whose membership has expired
- fine when returning, renewing loan period or changing loan period expiry date for the material whose loan period has expired
- cost of notification when allocating reserved material to the member
- cost of overdue notices when creating overdue notices
- loan fee or tear and wear fee when material is put on loan or when renewing loan period
- cost of reservation of available material for the loan of reserved material for a member, if material has status *O – reserved available copy*
- cost of uncollected material when deleting an expired reservation, if material has status *W – waiting on the shelf (reservation)*
- cost of issuing a new membership card when registering a new member
- cost of returning the material to a department different from the one in which the material was borrowed

7.2.2.1 Membership or admission fee

Precondition

Automatic entry of the debt for membership or admission fee can be performed if the following conditions are fulfilled:

- parameter for controlling membership validity is set
- price for membership fee or admission fee (type of service/debts 01 – CLA membership fee/admission fee) is entered to the price list for a certain member category, where the value *automatically* is set

under "Calculation method"

- member is not exempt from membership fee (check box under *Exempt from membership fee* is not ticked)
- new member (membership expiry date has not been entered yet) or the membership expired (membership expiry date is older than the current date)
- parameter for exemption from membership fee for members younger than 18 is set (the member, however, is older than 18)

Debt for admission fee is automatically calculated and recorded when entering new member. Once you finish entering data in the **Member** editor and you confirm the entry to the database of the members by clicking the **OK** button, the **Membership fee/Admission fee** window will open. Debt amount for membership fee will be displayed from the price list depending on the member category. If your answer is yes and you click the **Yes** button, the following will be recorded automatically:

- debt for the member
- current date in "Date of entry/membership renewal" (tab Membership in the Member editor)
- new membership expiry date in "Membership expiry date" (tab Membership in the Member editor) which is calculated depending on the settings related to membership validity period

Debt for membership fee is calculated automatically and recorded during the first visit of the member whose membership expired. Membership validity can be verified when accessing the **Home library material** window and when saving the data in the **Member** editor. The procedure of automatic entering of debt for membership fee is the same as for admission fee.

Membership validity is defined in one of the following ways:

- as membership period set in restrictions on operations for a specific or all membership categories (see chapter 2.6)
- as a date set in restrictions on operations which applies to all members of those categories for which membership validity period is not specified in restrictions on operations



Note:

Unless otherwise specified in restrictions on operations, the default membership validity period is 1 year.



Tip:

Upon the library's request it is possible to define with a special parameter that, when calculating new membership expiry date, membership validity period is calculated from membership expiry date instead of the current date.

What to do next

Enter debts settlement (see chapter 7.3).

7.2.2.1.1 Individual membership fee

In addition to automatically entering a membership fee or admission fee which is related to a member category (see chapter 7.2.2.1), a library can also use the option of automatically entering an individual membership fee or admission fee. The method of entering a membership fee or admission fee is customized for individual members and is related only to membership validity period.

If you wish to enter the membership fee customized for individual members, the following must be defined:

- in the local code list *Type of membership fee – individual (CODE 318)*, enter types of membership fee for different time periods that will be provided by your library; to define the time period, use the number of days, months or years (e.g. 14d, 2m, 2y, etc.).



Example:

The local code list *Type of membership fee – individual (CODE 318)* can be defined according to the library's requirements, the codes, however, should not contain more than three-digits, and the value after # must contain the time period in the prescribed structure (e.g. 7d, 100d, 6m, 5y); for example:

7d – weekly membership fee#7d
 14d – two-week membership fee#14d
 1m – monthly membership fee #1m
 6m – half-yearly membership fee#6m
 21 – two-year membership fee#2y
 251 – permanent membership#25y

etc.

or:

01 – weekly membership fee#7d
 02 – two-week membership fee #14d
 03 – monthly membership fee#1m
 04 – half-yearly membership fee #6m
 05 – two-year membership fee #2y
 06 – permanent membership#25y

etc.

- in the price list, enter the price of the membership fee or admission fee (Type of service/debts 24 – *CLS membership fee – individual*) for a specific time period and select the value *automatically* under “Calculation method”
- under member details in the **Membership** tab under the “Membership validity” attribute, select the relevant value of the time period for the

individual membership fee on the basis of the local code list *Type of membership fee – individual (CODE 318)*. The “Membership expiry date” attribute will be calculated automatically when you register a new member or renew membership on the basis of the entered time period under the “Membership validity” attribute (see chapter 3.1.2.3 *Entering membership data*).

7.2.2.2 Fine

Precondition

It is possible to enter debts for overdue fine automatically, if the following conditions are fulfilled:

- price for the fine for which the value in "Calculation method" is set to *automatically* is entered in the price list for the type of material
- expiry date is older than the current date for the copy which is put on outside loan or reading room loan
- the member is not exempt from overdue fine (the check box in the privilege *Fine exempt* is not ticked)

The debt for the fine is calculated automatically and recorded when returning the material, renewing loan period or changing expiry date. If the conditions for automatic entry of debt for overdue fine are fulfilled, the **Fine** window will open when using one of these methods. One or more copies you selected during the procedure and whose loan period expired can be found in the window. Accession number, type of material, number of days of delay and debt amount for the fine is displayed for each copy.

Debt amount for the fine is calculated by multiplying a daily fine by the number of days of delay starting from the expiry date. All copies are already selected in the **Fine** window by default. If you do not wish to charge the fine for a certain copy, you can deselect it. Confirm the selection by clicking the **OK** button. If you do not select any copy or if you close the window by clicking the **Cancel** button, the debt for the fine will be deleted, although the desired procedure with the material will be performed. If a library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off the debt when performing the procedure (see chapter 7.5).



Note:

When calculating the daily fine, if the price list changed within the delay period, the price from the archived price list will be taken into account; and, from the date when the price list was changed, the price from the current price list will be taken into account.

If in a library with departments the price list validity changed so that a price list with a defined date applies only for an individual department, and which applied for the entire library before that, the fine will not be calculated for the period for which the archived price list does not exist for this department.

**Tip:**

Fine status on the current date for the copies whose loan period expired can be checked if you click the **Current fine** button in the **Entering and settling debts** window.

**Tip:**

At library's request it is possible to set a special parameter which, when calculating the number of days of delay, takes into account only working days according to the calendar of the library or of the department.

**Tip:**

If the library allows returning of material without charging the fine because the material is returned within a specific period after loan period expired, this period must be defined in time parameters table (see chapter 2.1). If the material is returned within this period, the fine will not be charged, but the first day after this period expires, the fine will be charged for all days of delay.

At library's request it is possible to set a special parameter that does not take into account grace period when calculating the number of days of delay.

**Tip:**

If the library does not charge daily fines, upon request it is possible to set a special parameter that does not take into account the number of days of delay when calculating debt for fine, but the amount from the price list.

**Tip:**

In case of daily fine, the amount of unsettled fine can quickly grow, thus it is less likely that the member will settle his/her debt. Therefore, upon the library's request, it is possible to set up a special parameter which restricts the number of days when the amount of unsettled overdue fine increases.

Upon the library's request, it is possible to set up a special parameter to limit the number of days for which the fine can be charged until the date of receipt of the 3rd overdue notice.

What to do next

Enter debt settlement (see chapter 7.3).

7.2.2.3 Notification about available reserved material

Precondition

Automatic entry of the debt for notification about allocating reserved material to the member is possible if the following conditions are fulfilled:

- the price for notification about available reserved material is

entered to the price list and the value *automatically* is entered under "Calculation method"

- the member is **not** subscribed to notifications about available reserved material

Debt for notification about available reserved material is automatically entered:

- when returning the reserved material if the material is allocated to the member who reserved it (status *W*)
- when you prepare available material that the member reserved for collection (see chapter 4.13.1.1)

If the conditions for entering debt for notification are fulfilled, the **Cost of notification about availability of reserved material** window will open. Details of the member to whom the reserved material is allocated after returning and the amount of debt will be displayed. If your answer is yes and click the **Yes** button, the debt will be entered automatically. If your answer is no and you click the **No** button, the cost of notification about availability of reserved material will be written off. If the library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off debt (see chapter 7.5).

What to do next

Enter debt settlement (see chapter 7.3).

7.2.2.4 Costs of overdue notices

Precondition

Debts for costs of overdue notices are entered automatically when preparing overdue notices (see chapter 8.1), if the following conditions are fulfilled:

- the member received overdue notice for the material for which the loan period expired
- the price for the costs of overdue notices is entered to the price list, and under "Calculation method", the value *automatically* is entered

Costs of overdue notices can be specified in several ways:

- from the price list on the basis of the amount which represents the costs of the overdue notice (e.g. costs for the 1st overdue notice) regardless of for how many copies the member received this overdue notice
- from the price list on the basis of the amount calculated for each copy for which the member received an overdue notice; the price can vary depending on the type of material
- so that the cost of the new overdue notice overwrites the cost of the previous overdue notice (e.g. the cost of the 3rd overdue notice overwrites the cost of the 2nd overdue notice)



Note:

Upon the library's request, calculation method for overdue notices can be set up by a special parameter.

7.2.2.5 Loan fee or wear and tear fee

A library can charge a loan fee or a tear and wear fee to its members.

Precondition

Debts can be entered automatically if the following conditions are fulfilled:

- in the price list, a price for the loan fee is entered for different types of material, for which the value *automatically* is entered under "Calculation method"; prices are entered for those types of material for which loan fee is charged
- member is not exempt from paying the loan fee (check box under "No loan fee" is not ticked)

Debts for loan fee are entered automatically when material is put on outside loan or when loan period is renewed (if the loan period expiry date is greater than before it was renewed).

After clicking the **Lend** or **Renew** button, a question whether you wish to enter the debt, data on the selected material and the price for the loan fee will be displayed in a new window. If the answer is yes, the loan fee amount will be added to the amount of entered debts for the member. If the answer is no, the material will be put on loan for the member but the loan fee will not be recorded. If the library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off the debt (see chapter 7.5).



Note:

*Debts for the loan fee are **not** entered automatically:*

- if the loan period expiry date is changed manually*
- if a member renews the loan period through the My library service*
- if a member is exempt from paying the loan fee (the "No loan fee" check box is ticked)*

7.2.2.6 Cost of reservation of available material

A library can charge costs of reservation of available material to its members.

A debt can be automatically entered when reserved material is put on loan to a member if the material was not prepared for collection by using the **Unavailable material / Prepare reserved material for collection** method (in which case the material will get the status *W – waiting on the shelf (reserved)*).

Precondition

The following conditions must be fulfilled:

- in the price list, the price for the cost of reservation of available

material (item *NAR*) is entered, and the value *automatically* is selected under “Calculation method”

- reserved material has the loan status *O* – *reserved available copy*

After you click the **Lend** button, a new window will appear with a question whether you wish to enter the debt, data on the selected material and the price of the cost of reservation of available material. If your answer is yes, the amount will be added to the amount of entered debts for the member. If your answer is no, the debt will not be entered. If the library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off this debt (see chapter 7.5).

7.2.2.7 Cost of uncollected reserved material

A library can charge a cost of uncollected reserved material to its members.

Entering debts automatically can be performed when deleting an expired reservation for the member if the material was ready for collection (status *W* in loan procedures).

Precondition

The following conditions must be fulfilled:

- In the price list, the cost of uncollected reserved material (item *ZNR*) is entered and the value *automatically* is selected under “Calculation method”
- reserved material is waiting for the member and has the status *W* – *waiting on the shelf (reserved)* in loan procedures
- date of reservation validity has expired

You can delete an expired reservation individually in the **Home library material** window or you can batch delete expired reservations (see chapter 4.13.4). When deleting an individual reservation in the **Home library material** window, a question whether you wish to enter the debt, data on the selected material and the cost of uncollected reserved material will be displayed in a new window. If your answer is yes, the amount will be added to the amount of entered debts for the member. If your answer is no, the debt will not be entered. If the library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off this debt (see chapter 7.5).

7.2.2.8 Cost of issuing a new membership card

When registering a new member, a library can charge the cost of issuing a new membership card to its members.

Precondition

The following conditions must be fulfilled:

- the cost of issuing a new membership card for a specific member

category is entered in the price list (item *NIZ*) and the value *automatically* is selected under “Calculation method”

Entering a debt automatically can be performed when registering a new member when you save the data on the new member by clicking the **OK** button. When you do this, a question whether you wish to enter the debt, the data on the selected material and the cost of issuing a new membership card will be displayed. If your answer is yes, the amount will be added to the amount of entered debts for the member. If your answer is no, the debt will not be entered. If the library has the local code list *Reasons for deletion/writing off debts* (*CODE 317*), select the reason for writing off this debt (see chapter 7.5).

7.2.2.9 Cost of returning material to another department

A library can charge the cost of returning material to another library department.

Precondition

The following conditions must be fulfilled:

- the cost of returning the material to another department is entered in the price list (item *VRA*) and the value *automatically* is selected under “Calculation method”

A debt can be entered automatically when returning material to another library department. In this case, a question will appear in a new window, whether you wish to enter a debt, data on the selected material and a price for the cost of returning material to another department. If you answer positively the amount will be added to the amount of entered debts for the member. If you answer negatively, the debt will not be entered. If a library has the local code list *Reasons for deletion/writing off debts* (*CODE 317*), select a reason for writing off this debt (see chapter 7.5).

7.3 SETTLLING DEBTS AND PRINTING INVOICES

Since 1 January 2016, libraries in Slovenia must follow the *Act on fiscal verification of invoices* for cash register operations. Article 4 of the aforementioned act defines the obligations of the persons liable for the implementation of the procedure for verification of invoices for tax purposes in cash operations. In accordance with the Act, cash operations are possible only if the settings for fiscal verification of invoices are defined appropriately (see chapter 7.10). Libraries that are not liable to VAT can enter only non-cash payments outside the library.

Debts settlement is entered in the **Entering and settling debts** window.

Procedure



Tip:


If the object **Member** is already on the workspace, highlight it with the mouse.

1. In the **Member** class, find and select the member.
2. Select the **Object / Entering and settling debts** method.

The **Entering and settling debts** window will open.



Tip:

In the **Home library material** window, click the icon  under member's name.

3. Highlight the debt with the mouse on the list of entered debts which the member will settle.

The amount which must be paid by the member will be displayed in "Payment (total)".

4. Click the **Settle debts** button.

The **Debt settlement** window will open.

5. Enter the data related to debt settlement.

Select the method of settlement which can be cash, non-cash or non-cash payment outside the library. If you selected the non-cash method, you can select the type of non-cash method (e.g. Moneta) from the drop-down list; at the same time you can enter a note. You can enter the note to be printed on invoice or on the list of invoices as well. Enter the amount of cash you received from the member in "Cash". If you selected a non-cash method of settlement, the "Cash" field is not active.

If a member cannot settle the entire debt when he or she visits the library, you can enter a partial debts settlement, in which case you enter, under "Amount due", the amount that the member will settle on that visit. After

you confirm it, debts will be reduced by the settled amount, and the number of items will change accordingly. The rest of the unsettled debts will remain entered for the member.

6. By clicking **OK**, the invoice will be printed to printer.

If you select non-cash payment outside the library, the invoice will not be printed. If the cash amount is higher than the amount to be settled, the amount to be returned to the member will be displayed in the **Message** window.

In the transaction file, data on the transaction of the payment, based on which the visit by member was recorded, will be entered. The visit will be entered also when there is no transaction of the material.

Options

You can print the invoice to printer:

by clicking the **View settled debts** button in the **Entering and settling debts** window a list of invoices entered within the selected period will be displayed

by selecting the invoice and clicking the **Load invoice** button

on the workspace, highlight the invoice and use the **Send** or **Print** method; select *Invoice* in the list of definitions



Note:

*From now on, if a member requests the invoice copy, you can print the copy by using the **Create copy** method and not by reprinting the invoice (see chapter 7.3.2).*



Note:

When entering non-cash debt settlement outside the library the invoice is not printed, therefore the invoice counter will not change, and the invoice will not be sent to FURS for verification. As the payment was not performed in the library, the settled amount is not added to the total cash register balance.



Tip:

A library can define what will be printed on the invoice by changing default settings and using the **Home library/Create lending forms and invoices** method. The following data is **printed** on the invoice by default: member's name and surname, library department, amount in cash and change, and the data on the person who lent the item. For libraries liable for fiscal verification of invoices, printing the data on the person who lent the item is obligatory; for this reason, it is recommended not to change the default setting. The following data will **not** be **printed** by default: membership expiry date, name of the faculty or university, note entered during debt settlement, list of unsettled debts and list of entered material.

**Tip:**

The text of the clause related to VAT exemption is displayed based on the exemption clause that is defined under the item in the price list. Before you update the price list of clauses by which the delivery of goods or services in a library is exempt from VAT, these clauses must be entered to the local code list *VAT exemption clause (CODE 323)*.

7.3.1 Setting up invoice counters

The structure of the invoice number in libraries that are not liable for fiscal verification of invoice is as follows:

- oonnnnn/llll, in libraries with departments;
- n/llll, in libraries with no departments

where oo = department ID (e.g. 01), nnnnn = running invoice number (e.g. 00125) and llll = invoice issue year (e.g. 2010).

If a library wishes to have a different structure of the invoice number, use the **Invoice / Set invoice No.** method. Enter the number that is for one less than the number of the first issued invoice after the method is applied. You can enter only numbers (not characters or letters). The department ID (in libraries with departments) and a year of issuing the invoice are added automatically. It is recommended to set the invoice number before you start entering debt settlements.

The structure of the invoice number in libraries liable for fiscal verification of invoices must consist of the following three parts:

- business premises designation
- designation of the electronic device for issuing invoices
- current invoice number

**Note:**

*Before issuing the first invoice after the cash register was activated, **the library must set the running numbers invoice counter in accordance with the adopted internal document.** Invoices can be counted by business premisses or by individual electronic devices. Numbering by business premisses is set as default. Upon the library's request, numbering by electronic devices can be activated by setting up a special parameter.*

You can set the invoice number by using the **Invoice/Set invoice** number method. The **Invoice counters** editor, where the counters for numbering by business premisses or individual electronic devices are shown, will open. After selecting the invoice counter, enter the initial invoice number which must be one number less than the number you wish the first invoice to be numbered

with. The default value in counters is 0, which means that the first invoice within the business premises or individual electronic device will have value 1. Once you have entered the appropriate value for the invoice number, click the **Confirm counter** button. Do the same with the other invoice counters. When you wish to exit the **Invoice counter** editor, click the **Exit** button.

7.3.2 Issuing a copy

If a member wants to have a copy of the invoice or the credit note, you can now issue a copy by using the **Create copy** method; you no longer have to reprint the invoice or credit note.

First you must search for the invoice or credit note. You can do this in the following two ways:

- find a member; then in the member's debts and settlement records (**Entering and settling debts** method) find (**View settled debts** button) the invoice or credit note and load it to the workspace (**Load invoice** button)
- highlight the **Invoice** (or **Credit note**) class, select **Search** and then in the search window enter the requested value under the relevant search filed (e.g. invoice number)

Procedure



1. Highlight the invoice or credit note on the workspace and use the **Create copy** method.

The **Overview and sending of created report** window will open.

2. Click the **Send** button.

The copy will be printed to printer.

The copy is the same as the original invoice or credit note but with the COPY <current number of the copy> displayed on it. Every issued invoice copy is automatically recorded, and the issued copy is numbered with the next current number.

Issued copies are shown under related objects for the invoice or credit note when the invoice or credit note is loaded to the workspace. By double clicking the link **Invoice copies** or **Credit note copies**, the window with a list of all copies for the selected invoice or credit note will open.

The list of copies can also be printed by selecting the **Print** or **Send** methods on the invoice or credit note on the workspace and in the list of definitions selecting the appropriate list of copies. In the list, the number of the invoice for which you created the list of printed copies and after that the data on the individual printed copies (copy number, copy date and the username of the person who created the copy) will be displayed.

7.3.3 Settling debts for non-members

Debts settlement can also be entered when a payable service (e.g. photocopying) was performed for a person who is not a library member.

Procedure



3. In the **Invoice** class, select the **Enter debts settlement for non-member** method.

The **Debts settlement for non-members** window will open.

4. Click the **Add item** button.

The **Debts entry – select service/debts** window will open.

5. Select the type of service or debts for a non-member to settle.

Select the type of service or debts and click the **OK** button. You can select only one type of service or debts.

The **Invoice item** window will open.

6. If necessary, change the data in the **Invoice item** window (e.g. number of items).

After you click the **OK** button, the item will be added to the list of debts to be settled in the **Debts settlement for non-members** window. In the same way you can add other debts for the member to settle.



Tip:

If you wish to delete the item from the list, select it and click the **Remove** button.

7. Continue the procedure by clicking the **Settle debts** button.

The **Debts settlement** window will open, where you can enter the payment for entered debts in the same way as you settle debts for library members.

Select the payment method, which can be cash, non-cash, or non-cash outside library. If you select the non-cash method, you can select a type of non-cash payment from the drop-down list (e.g. Moneta), and you can enter a note at the same time. Also, you can enter a note to be displayed on the invoice and on the list of invoices. Under »Cash«, enter the amount in cash that you received from the member. If you select the non-cash method of payment, the »Cash« field will be inactive.



Note:

You cannot enter a partial debts settlement for a person who is not a library member.

8. By clicking the **OK** button in the **Debts settlement** window, you will be returned to the **Debts settlement for non-members** window.
9. By clicking the **OK** button, confirm and print the invoice. If you make a mistake, you can cancel the invoice by clicking the **Cancel** button.

The settled amount will be added to the cash register balance and will be displayed also on the report when closing out cash register and on the list of invoices report (LOAN-CRO-01: List of invoices and LOAN-CRO-02: List of invoices incl. VAT). If a person is not a library member, the place for the membership card number on the report will be blank.

Options

You can print the invoice again by finding it in the **Invoice** class (e.g. by the invoice date), loading it to the workspace, selecting the **Object / Send** or **Object / Print** method, and selecting *Invoice* in the list of definitions.



Note:

*If a non-member requests the invoice copy, you can print the copy by using the **Create copy** method, you no longer have to reprint the invoice (see chapter 7.3.2).*

You can cancel debts settlement subsequently by finding the invoice in the **Invoice** class and selecting the **Object / Show** method. You can cancel the invoice by clicking the **Cancel** button. You can print the cancelled invoice by finding it in the **Invoice** search window and then selecting the **Object / Send** or **Object / Print** method. Select *Cancellation of invoice* in the list of definitions.

7.4 OVERVIEW OF DEBTS

You can see the debts recorded for the member in two ways:

- in the **Entering and settling debts** window
- in the **Entered debts** class

Procedure



1. In the **Member** class, find and select the member.
2. Select the **Object / Entering and settling debts** method.

The **Entering and settling debts** window will open.

Tip:

If you are in the **Home library material** window, click the icon  under member's name.

If you wish to view the current fines, click the **Current fine** button.

When viewing transactions in the **Entering and settling debts** window and in the **Transaction** class, under the transaction types *writing off debts* and *debts deletion*, a reason for deletion or writing off debts will be displayed (column *Reason of deletion/writing off debts*).

In libraries with departments it is possible to select the department for which you wish to see the entered debts in the upper right corner. The department to which you are logged in as a user is selected by default. If you wish to see all debts entered for the member, select *all departments*.

3. On the list of entered debts highlight the debt with the mouse and click the **Show** button.

In the **Viewing – Entered debts** window, details on the entered debt will be displayed.

If any debts were already partially settled, the original number of items will be displayed in the column “No. of items – initial”, and the amount settled will be displayed in the column “Paid”.

7.5 DELETING DEBTS

Debts entered for the member can be deleted in the **Entering and settling debts** window. Highlight the debt(s) on the list of entered debts and click the **Delete debts** button.

If a library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for deletion when deleting the debt.



Tip:

A library can create the local code list *Reasons for deletion/writing off debts (CODE 317)*. If a library created the code list, a reason for deletion or writing off debts must be selected from the code list in the procedure of deletion or writing off debts, which will appear when viewing transactions for the member in the **Entering and settling transactions** window and in the LOAN-CRO-03 and LOAN-TR-04 reports.



Example:

The local code list *Reason for deletion/writing off debts (CODE 317)* can be customized according to the library's requirements, e.g.:

- 01 – certificate issued by Employment Service of Slovenia
- 02 – error (found on the shelf)
- 03 – error (reading room loan)
- 04 – donated membership fee (member donation)
- 05 – error when selecting debt
- 06 – error in e-notification
- 07 – member's accident/illness (approved by director)
- etc.



Note:

To delete a debt, the privilege CRO_DEL – Deleting debts is required.

7.6 CANCELLING DEBTS SETTLEMENT

If you entered debt settlement by mistake or with incorrect amount, you can cancel it. Cancelled debt settlement means that the debt(s) is/are recorded as unsettled again. Cancellation refers to individual invoice, which means that several invoices could have been paid during one settlement.

Precondition

To settle debt the cash register must not be closed. In libraries with departments, in a particular department you can cancel only those debt settlements which were also entered in that department.

Procedure

1. In the **Member** class find and select the member.
2. Select the **Object / Entering and settling debts** method.

The **Entering and settling debts** window will open.



Tip:

If you are in the **Home library material** window, click the icon  under member's name.



3. Click the **View settled debts** button.

The **Parameters for checking** window will open. Use it to select the department (in libraries with departments) and the period for which you wish to see settled debts.

4. Confirm by clicking the **OK** button.

The **Settled debts** window will open. Use it to see the list of settled debts according to parameters which you entered.

5. Select the debt settlement that you wish to cancel and click the **Cancel** button.

The **Cancel** window will open where details are displayed. Confirm the cancellation by clicking the **Send** button in this window and print the cancelled invoice. By clicking the **OK** button you will only confirm the cancellation without printing. By clicking the **Cancel** button you can cancel invoice cancellation.

Cancelled invoice can be found in the search window of the **Invoice** class by checking **Yes** in the "Invoice cancelled" search field. Such invoice is displayed in red colour on the workspace. Cash register balance will be reduced by the cancelled amount.



Note:

To cancel debts settlements, the privilege CRO_CAN – Debts settlement cancellation is required.



Note:

Non-cash debts settlements, performed by payment outside the library, cannot be cancelled.

What to do next

If you entered the debt that you cancelled for the member by mistake, you can delete it (see chapter 7.5).

7.7 REPAYMENT (CREDIT NOTE)

Until now, when the money had to be returned from the cash register to a member and the invoice could not be cancelled, the money was returned by entering debts in a negative amount and settling debts by entering the negative amount. Since the installation of COBISS3/Loan V6.4-02, this option is disabled. From now on, you can issue credit notes for this purpose. This option is now available in all libraries, regardless of whether the library uses the certified cash register or not.

If you wish to return the money to a member, you can do this in the following way:

Procedure



1. Find the invoice, where the debts settlement, for which you wish to return the money to the member, is entered.

You can do this in the following two ways:

- find a member and then in his/her debts and settlement records (the **Entering and settling debts** method) find the invoice (the **View settled debts** button) and load it to the workspace by highlighting it and clicking the **Load invoice** button.
 - Highlight the **Invoice** class, select **Search** and then in the search window enter the value you are searching for under the relevant search field (e.g. invoice number)
2. Highlight the invoice on the workspace and select the **Create credit note** method.

The **Credit note** window will open, where data on the invoice and a list of all items on the invoice will be displayed.

3. Highlight the item for which you wish to return the money and click the **Add item** button.

The **Credit note item** window will open, where the number of units of the selected item will be displayed as default.

4. Click **OK**.

If you wish to issue a credit note for fewer units, clear the number and enter the relevant number of the item units.

Return to the **Credit note** window, where under »Repayment (total)«, the amount you will return to the member will be displayed. If you added an item by mistake, you can remove it by highlighting it in the list below and clicking the **Remove** button.

If you wish to add an item from the selected invoice to the credit note, repeat the procedure.

5. Save the credit note and print it by clicking the **OK** button.

If your library uses the certified cash register, the credit note will be sent to FURS for verification.

If you wish to cancel the creation of the credit note, click the **Cancel** button.

On the credit note, the same data will be displayed as on the issued invoice. Also, the invoice number as well as the date and time of issuing the invoice, for which the credit note was issued, will be displayed. The amounts will be preceded by a minus sign. Credit notes will be numbered by the same counter as invoices. The name of the report that will be issued for a member together with the returned money will be *CREDIT NOTE no.*

<invoice_current_number>. Issued credit notes are recorded as a special transaction (*12 – repayment (credit note)*), which can be seen when viewing transactions in the cash register for the selected member.



Note:

You can only create a credit note on the basis of the invoice that was already submitted to the user. You can create several credit notes for one invoice, but the credit notes must not exceed the total amount of the invoice.

7.8 CLOSING OUT CASH REGISTER AND PRINTING LIST OF INVOICES

At the end of the day or when the user completes his/her work, you will close cash register and print the list of invoices. The list of invoices shows cash register balance at closure and the list of all settled debts, including cancelled settlements.

Precondition

Cash register has not been closed yet.

Procedure

1. Highlight the **Cash register balance** class.
2. Select the **Class / Close cash register** method.

The window containing the list of open cash registers will open. In libraries with department only those cash registers which are open in department in which you are currently signed in as a user are displayed on the list. Data on department, username, starting data and current amount of cash and non-cash is displayed for every open cash register.

3. Highlight and select the cash register with the mouse.

It is possible to display details or to close the selected cash register. Before closing the cash register it is recommended to check the list of invoices.

4. By clicking the **Check invoices** button the list of open invoices will be displayed for the selected cash register.

Check the list of invoices and the final balance of cash and non-cash payments in the library. A list of non-cash payments that were performed outside the library (e.g. with Moneta in the My library service) can be printed on the report LOAN-CRO-01: List of invoices.

5. If the balance on the report matches the actual balance, click the **Close** button.

If you answer affirmatively, you can close the cash register and print the list of invoices.



Note:

Closing the cash register cannot be cancelled. It is not possible to cancel debt settlements on an already closed invoice.



Note:

To close the cash register, the privilege CRO_CCR – Closing out cash register is required.

Options

The list of invoices can also be printed from the COBISS3/Reports module as, if you select the report LOAN-CRO-01: List of invoices in the Business operations report group.

7.9 OVERVIEW OF CASH REGISTER TRANSACTIONS

Cash register transactions can be viewed in two ways:

- overview of cash register transactions for individual member
- overview of cash register transactions in the search window of the **Transaction** class

Procedure

1. In the **Member** class find and select the member.
2. Select the **Object / Entering and settling debts** method.

The **Entering and settling debts** window will open.



Tip:

If you are in the **Home library material** window, click the icon  under member's name.



3. Click the **View transactions** button.

The **Parameters for checking** window will open. Use it to select the department and the period for which you wish to see transactions.

4. Confirm by clicking the **OK** button.

The **View transactions** window will open, where you can find a list of cash register transactions depending on the parameters that you defined. The list is sorted in descending order by transaction date. In the “Reason for deletion/writing off debts” column, under the transaction types *writing off debts* and *debts deletion*, a reason for deletion or writing off debts will also be displayed.

By clicking the **Send** button the list can be printed to printer.

7.10 FISCAL VERIFICATION OF INVOICES

In Slovenia, since 1 January 2016, in accordance with the provisions of Article 4 of the *Act on Fiscal Verification of Invoices* (hereinafter referred to as ZDavPR), persons liable for fiscal verification of invoices have the following obligations:

1. Persons liable shall issue invoices with application of the electronic device for issuing invoices, which enables electronic signature of data about the invoice and electronic connection for exchange of data with the tax authority.
2. During the procedure, persons liable shall use the digital certificate for purposes of identification and for electronic signing in the procedure for verification of invoices.
3. Persons liable shall confirm invoices at the tax authority in accordance with this act and issue invoices with the unique identification invoice mark.
4. Before issuing of invoices persons liable shall submit data about all business premises, in which they issue invoices, to the tax authority.

The implementation of ZDavPR is defined in detail in the *Regulation on the implementation of the Act on fiscal verification of invoices* (hereinafter referred to as the Regulation).

ZDavPR and the Regulation impose some obligations on the persons liable for fiscal verification of invoices that need to be carried out before they start performing the verification of invoices. For this reason, before starting to use the cash register, the library must:

- adopt the internal document
- submit data about the business premises to the tax authority
- acquire the digital certificate
- update details on the persons employed in the library who issue invoices in the COBISS/Loan software module by adding their tax identification number
- provide printers for printing invoices that enable printing the QR code
- display the notice on the obligation to issue invoices and the obligation of buyers to accept and keep issued invoices

1. Adopting the internal document

In this document, the person liable prescribes rules for assigning sequence numbers of invoices, prepares a list of business premises and assigns marks to business premises. The internal document must be adopted before issuing invoices in cash operations. The person liable must submit the internal document in the supervision procedure upon request of the tax authority (therefore, there is no need to send it to FURS).

**Tip:**

The Regulation states that the mark of business premises and electronic devices should include at least 1 and up to 20 characters (letters a–z, A–Z and numbers 0–9). When defining the mark of business premises and the electronic cash register, the libraries must take into account the width of the slip for printing invoices. We recommend that, when adopting the internal document, the length of the mark of business premises and electronic devices is limited to up to 10 digits.

According to the Regulation, you can number the invoices in the following two ways:

- numbering by business premises
- numbering by electronic devices for issuing invoices

The sequence numbers of invoices must follow each other in the continuous sequence every business year according to the numbering method you selected.

Numbering by business premises means that one counter of the sequence numbers of the invoice will be used for all cash registers that a library uses in the business premises.

**Example:**

A library has three electronic devices (CASH1, CASH2, CASH3) for issuing invoices in the business premises PREMISES1. An electronic device for issuing invoices is an individual workstation to which a library employee is logged in to the COBISS/Loan software module. When the first invoice in the business premises on the cash register CASH1 is issued, the invoice number will be PREMISES1-CASH1-1. When the second invoice on the electronic device CASH2 is issued in the same business premises, the invoice number will be PREMISES1-CASH2-2. If the consecutive invoice is issued on the electronic device CASH1, the number will be PREMISES1-CASH1-3.

**Tip:**

We recommend that libraries select numbering by business premises, which is also a default value for the numbering method in the COBISS software. If a library selects numbering by electronic devices, before issuing the first invoice, the library must notify IZUM so that IZUM enables this numbering method by setting up a special parameter.

Numbering by individual electronic device means that a separate counter of running numbers is used for every cash register.

**Example:**

A library has three electronic devices (CASH1, CASH2, CASH3) for issuing invoices in the business premises PREMISES1. When the first invoice in the business premises on the cash register CASH1 is issued, the invoice number will be PREMISES1-CASH1. When the second invoice on the electronic

device CASH2 is issued in the same business premises, the invoice number will be PREMISES1-CASH2-1. If the consecutive invoice is issued on the electronic device CASH1, the invoice number will be PREMISES1-CASH1-2.



Note:

If a library is not an independent institution, the numbering of invoices in a library must be adjusted to the method of numbering invoices that is defined in the internal document for the entire institution, of which the library is a part of.

2. Submitting data on the business premises to the tax authority

Podatki o poslovnih prostorih zavezanca, ki jih je za namene izvajanja potrjevanja računov treba posredovati davčnemu organu (8. člen ZDavPR), so naslednji:

- taxable person's tax number
- business premises mark
- data on the business premises defined in the register of immovable property (number of cadastral community, number of the building and number of the part of the building)
- address of business premises
- type of business premises, if the taxable person issues invoices in a movable business premises (e.g. mobile library)
- date when submitted data becomes valid

The taxable person must submit the abovementioned data to the tax authority before starting to issue invoices. The data must be submitted for each business premise in which the library issues invoices. The data is submitted to the tax authority via the established electronic connection and must be signed with a digital certificate for invoice fiscal verification purposes.

For this purpose, the COBISS software was updated with the option of entering the required data for each business premise and sending the required data to FURS. The procedure for entering business premises and sending data to FURS is described in chapter 7.10.1.

3. Acquiring a digital certificate for invoice fiscal verification purposes (library)

For the purposes of fiscal verification and sending data on the business premises, the library must acquire the digital certificate with the purpose of use DavPotRac. The application for the certificate must be submitted by the library via the eDavki portal. The certificate must be collected via the portal for collecting digital certificates for invoice fiscal verification purposes. The certificate must be installed to all workstations at which invoices are issued.

4. Invoice content

In addition to the legally required data, defined by the regulations on value added tax and the taxing procedure, the invoice must also include the following data:

- time of issuing the invoice
- designation of individual issuing the invoice with the use of the electronic cash register
- unique identification invoice mark – EOR
- protective mark of the invoice issuer – ZOI (in text and graphic form)

For the purposes of fiscal verification and issuing of invoices, the invoice must consist of three parts:

- mark of business premises
- mark of the electronic device for issuing invoices
- sequence number of the invoice

5. Tax number of the individual who issues the invoice

The law states that the tax number of the person issuing the invoice with the electronic device must be sent to FURS as part of the fiscal verification procedure. The person liable must link the mark of the person issuing the invoice with the tax number of that person. The data on the tax number of the person issuing the invoice is mandatory, which means that for every person in the library who settles debts and issues invoices, you must have the data on the tax number.

Due to this fact the central register of users has been updated with the option of entering the tax number. All library employees who work in the loan departments must update their data on the Training portal with their tax number. If the data on the tax number is not entered for the user account of the person who wishes to enter the settlement of debts of issue an invoice, that person will not be able to perform the procedure of entering the debts settlement or issuing an invoice.

6. QR code display

As defined in Article 5 of the Regulation, the protective mark of the invoice issuer must be indicated on the invoice in word form and the form of a QR code, code PDF 417 or several barcodes of the type Code 128.



Note:

The COBISS3/Loan software module only allows for the display of the protective mark of the invoice issuer only in form of a QR code out of all permitted options. This means that, for the purposes of invoice issuing, libraries must only use printers that support the printing of QR codes.

Libraries that use the COBISS3/Loan software module and already print invoices can continue to use the same printers for printing invoices under the condition that the printers support the graphic printing mode.

7. Displaying the notification on the obligation of issuing invoices and the customer's obligation to take and keep the issued invoice

Article 12 of ZDavPR states that the person liable must, on every electronic device for issuing invoices or another visible place put the notification on the obligation of issuing an invoice and handing it to the customer, and the customer's obligation to take and keep the invoice. The content and layout of the notice is precisely defined in Article 18 of the regulation and is published as Supplement III of the abovementioned regulation.



Note:

*Libraries that inform IZUM that they are not liable for fiscal verification of invoices can only enter non-cash payments outside the library. This means that they can only select the option of non-cash payments outside the library in the **Debts settlement** window. This settlement option is only intended for entering the debts settlement and any possible additional information on the debts settlement outside the library, but an invoice is not prepared.*

These libraries also cannot cancel an invoice or issue credit or invoice copies as they do not perform cash operations.

7.10.1 Entering data on business premises

Entering and sending data on business premises for verification to the taxing authority is performed in the COBISS3 software module regardless of whether the library uses the COBISS3/Loan software module or the COBISS2/Loan software module. The data on the business premises is edited as part of the data on the home library. When the COBISS3 software is installed, the general data on the home library is copied from the COLIB database.



Note:

To enter and edit data on the home library, the privilege ADM_PARTNER – Partner data maintenance is required.

The data on the business premises is entered by the library on the basis of an adopted internal document defining the list of business premises and their marks with an inventory of electronic devices that are used in the individual business premises for the issuing of invoices.

Procedure



1. In the list of classes of the COBISS3/Application Administration software module or the COBISS3/Loan software module, select the **Home library** class and double-click on it to load it to your workspace.
2. Select the method **Object / Edit** method.
The **Home library** editor window will open.
3. Select the **Details** tab and then **Business premises**.
4. Click **New object**.
The **Business premises** editor window will open.

5. Enter the data on the business premises.

- business premises mark

Due to the width of the invoice slip an up to 10-digit mark is recommended. The mark must not contain any fricatives or special symbols.

- for immovable business premises enter the immovable property's identification mark composed of the following three elements:

- number of the cadastral community
- number of the building
- number of the part of the building

- for movable business premises also enter the address of the business premises composed of the following elements:

- street
- house number
- addition to the house number (mandatory, if existing)
- town
- post office (city)
- postcode

- type of business premises

The default value is *immovable business premises*, which indicates immovable business premises such as library premises within a building or part of a building. The remaining values (*A – movable object*, *B – object at a permanent location*, *C – individual electronic device for issuing invoices or pre-numbered invoice book*) indicate movable business premises. In the case of libraries, only a mobile library or lending kiosks are examples of movable business premises. If you wish to enter a mobile library as the movable business premises, select value *A – movable object*. According to Supplement II of the Regulation on the implementation of the Act on fiscal verification of invoices, vehicles or movable stands are listed as movable business premises. If you wish to enter a lending kiosk as the business premises, select *B – object at a permanent location*.

- under "Other (notes)" enter any notes related to the business premises
- in libraries with departments select one or several departments for which the data on the business premises applies
- enter the data on electronic devices (see chapter 7.10.3)

When sending data on business premises for verification to the taxing authority, you must enter the data on the electronic device and install the digital certificate at least for the electronic device from which you will send the data for verification. The data on the remaining electronic devices can also be entered later after the data on the business premises is already confirmed.

6. Save the data by clicking the **OK** button if you do not wish to send it to FURS straight away. If you wish to send in the data for verification immediately, click the **Send to FURS** button.

If some of the mandatory data on the business premises is missing, a warning will be displayed.

7.10.2 Sending data on business premises to FURS for verification

The data for every business premise where invoices will be issued must be sent to the taxing authority (FURS), otherwise it will not be possible to issue invoices.

The data on the business premises is sent for verification by clicking the **Send to FURS** button. A warning will be displayed with the question if you are sure that you want to send the data on business premises for verification. If the answer is affirmative, after the data is successfully sent a message will be displayed saying that the data is verified; in the data on the business premises under **Info** tab a tick is automatically added next to "Verified (FURS)" and the current date is entered automatically under "Validity date". If one of the settings is missing (tax number of the home library or the user, certificate) a warning is displayed.

Once the data on the business premises is verified it can no longer be changed. If the data needs to be changed subsequently, click the **Change data** button. Until the changed data is sent to FURS for verification issuing invoices in those business premises will not be possible.



Note:

*Business premises cannot be deleted. When you stop issuing invoices at the business premises, they can be closed by clicking the **Close bus. Premises** button. The data on the closing of the business premises must be sent to FURS immediately. Issuing invoices in closed business premises is not possible; it is also not possible to enter other business premises with the same mark. However, it is possible to add the electronic device from the closed business premises to other business premises.*

7.10.3 Entering data on electronic devices and installing the digital certificate

The data must be entered for all electronic devices (workstations) where invoices are issued. At the same time a digital certificate for invoice fiscal verification purposes must be installed to every electronic device on which invoices are issued.

**Tip:**

The free digital certificate for invoice fiscal verification purposes can be obtained by the library from FURS.

**Note:**

After the certificate is installed the COBISS software only remembers the path to the certificate. This means that you have to save the certificate to the correct location first (the local computer or electronic device, online, etc.) and then install it to the electronic devices in COBISS3. The certificate must remain save at the same location after the installation.

If every user logs into their user account (profile) on the same electronic device, the certificate must be installed for every account (profile) on the electronic device separately.

Procedure

1. In the **Business premises** window, click **New object** under "Electronic devices".

The **Electronic device** window will open.

2. Under "Electronic device mark", enter the mark of the electronic device as defined in the internal document.
3. Under "Computer name" the name of the computer that you work on will be entered automatically.

If you are entering data for another electronic device and not the one you are currently working on, delete the default computer name and enter another one.

**Tip:**

You have to find out the name of the computer on which you will perform the fiscal invoice verification procedures. There are several options to do this:

- select the About FURS option under the Help menu in the menu bar in COBISS3
- use the command CC3 in COBISS2
- in the Windows operation system:
 - Windows7 and Vista (<http://windows.microsoft.com/en-us/windows/find-computer-name#ITC=windows-7>)
 - Windows 8 and 10 (Control Panel\System and Security\System)

**Note:**

It is not possible to enter two electronic devices with the same computer name unless the business premises that the electronic device belong to are closed.

4. Install the digital certificate by clicking the **Install certificate** button.

A window will open in which you select the location. Once you enter the password a message on the successful installation will be displayed.



Note:

When installing the digital certificate you must be logged into the electronic device to which you install the certificate.

5. Save the data on the electronic device by clicking the **OK** button.
6. If you wish to use the electronic device for issuing invoices immediately, click the **Use** button.



Note:

*The data on the business premises must be confirmed before you activate the electronic device for issuing invoices by clicking the **Use** button.*

7.10.4 About FURS

In order to help with entering electronic devices and establishing the reasons for problems with sending data to FURS it is possible to display some key information related to the settings. For this purpose, the **About FURS** method was added in the menu bar under the **Help** menu. Once you select the **About FURS** method, a window will open where the following data will be displayed:

- username
- login department
- certificate location
- certificate holder
- data on public FURS certificate
- FURS web address
- connection success with FURS
- computer name
- electronic device mark
- business premises mark
- description of errors (if any)
- tax number of liable person
- tax number of user – is it entered

7.10.5 Testing the connection to the FURS information system

If you wish to check if a connection can be established to the FURS information system, use the **Invoice/Test connection to FURS** method. Based on the result, the corresponding message will be displayed.

7.10.6 Subsequent fiscal verification of invoices

ZDavPR defines the obligations of the person liable in *Articles 9* and *10* in case it is not possible to issue an invoice with EOR and in cases where the electronic device for issuing invoices does not work. In both cases, you have up to two working days or until the following working day after the causes for the delay were removed to send the data on the invoices to the taxing authority for verification.

Invoices that were not verified by FURS when the debts were settled are added to the unverified invoices and must be sent to FURS to be verified again as soon as possible. Invoices that were not verified by FURS will have the ZOI and QR code, but the EOR is missing.

When FURS successfully verifies the invoice for the first time a warning is displayed that there are unverified invoices in the queue. The warning is displayed as long as there is at least one unverified invoice in the queue.

Procedure



1. Select the **Invoice** class and then the **Send unverified invoices to FURS** method.

A window will open with the list of unverified invoices.

2. Click the **Select all** button.

All invoices from the list will be sent to FURS for fiscal verification. A message will be displayed on the success of sending, and "EOR" and "Date EOR – subsequently" will be entered for the invoices.

7.11 DISPLAYING DATA ON ISSUED INVOICES

Upon a tax authority official's request for tax audit purposes, the taxable person must submit data from the electronic register of issued invoices for cash operations in the mode and form prescribed in the *Rules amending the Rules on the requirements regarding software and electronic devices, on the management and operation of information systems and on the content, form, method and time limits for the submission of data (Official Gazette RS, No. 18/16)*.

In accordance with the changes made to the initial Rules from 2013 (*Rules on the requirements regarding software and electronic devices, on the management and operation of information systems and on the content, form, method and time limits for the submission of data (Official Gazette RS 35/13 and amended 42/13)*), up until the amendment of the rules, it was possible to create these two reports in the COBISS3/Reports software module in the **Data export** group. The reports are now updated and can be created in the COBISS3/Loan software module.

The data from the electronic register of issued invoices by the taxable person is entered into structured computer files in standard form with the following names:

- REPORT INVOICES HEADERS.TXT – data on issued invoices
- REPORT INVOICES ITEMS.TXT – data on items on issued invoices

Procedure

1. In the **Invoice** class, select the appropriate method:
 - **Display data on issued invoices (REPORT INVOICES HEADERS.TXT)**
 - **Display data on issued invoices (REPORT INVOICES ITEMS.TXT)**
2. In the **REPORT INVOICES HEADERS.TXT** window or the **REPORT INVOICES ITEMS.TXT** window, specify the time period.



Note:

Each file must contain data for each calendar year. If the taxing authority requests a report for several years, the report and the files must be created for each year individually. If the taxing authority requests the report with summary data in the current calendar year, the file must contain the entry of data from the day that the request was made onwards. This means that when the report and/or file is created, the date of the previous day must be entered as the end date.

3. Click the **Find** button.

Under "Number of records" the number of records in the file is displayed.

4. Click the **File location** button.

The **Select location** window will open, where you define the folder on the computer where each file will be saved.

5. Click the **Save** button.

The data is saved to the file in the selected folder. Under "File name" the location and file name are displayed.

6. Click the **Exit** button to close the window.

The Rules also prescribe the form, in which the data must be submitted:

Data are written on standard computer disks of 3.5in (1.44 MB) or on standard CDs of 700 MB or on standard DVDs of 4.7 GB. Notwithstanding the previous sentence, the person liable for tax may submit data also on other data mediums on condition that all data prescribed by these rules are provided.

The envelope of the data medium has the following data printed in a readable manner:

- *title and tax number of the person liable for tax*
- *type of data print*
- *period covered by the print of data*
- *number of prints in each file*
- *calculated condensed values of data in each file on the basis of algorithms MD5 (32 characters in the hexadecimal notation) and SHA-1 (40 characters in the hexadecimal notation)*

The calculated condensed values of data are required to ensure data identification. To calculate the condensed values in each file on the basis of algorithms MD5 (32 characters in the hexadecimal notation) and SHA-1 (40 characters in the hexadecimal notation), use tools or programs, available online free of charge (e.g. the web application <http://onlinemd5.com/>, or the MD5 and SHA Checksum Utility tool).

8 OVERDUE NOTICES

Library can send overdue notices and charge the costs of overdue notices to members who do not return the material on time. The frequency of creating overdue notices depends on the library's operating activities.

Subchapters:

- Creating overdue notices
- Printing overdue notices
- Cancelling creation of overdue notices
- Overview of overdue notices
- Creating overdue notice forms

8.1 CREATING OVERDUE NOTICES

The procedure of creating overdue notices enables automatic entering of overdue notices for the material whose loan period expired and automatic entering of debts for overdue notices. Library defines the criteria concerning how much time can elapse from loan period expiry before the member gets the overdue notice and in which time intervals the overdue notices should be sent (see chapter 2.1).



Example:

The member will receive overdue notice depending on grace period settings for individual overdue notices in time parameter table:

1st overdue notice = 3d means 3 days after loan period expiry

2nd overdue notice = 7d means 7 days upon reception of the 1st overdue notice

3rd overdue notice = 14d means 14 days upon reception of the 2nd overdue notice

4th overdue notice = 21d means 21 days upon reception of the 3rd overdue notice

Library can send up to 4 overdue notices to the member. How many overdue notices will be sent is defined by a special parameter at library's request.

A library can also define the price and the method of charging costs for overdue notices (see chapter 7.1). A special parameter can be set up to define whether costs for overdue notices will be charged according to an overdue notice or according to the number of items for which a member received an individual overdue notice.

Precondition

When creating overdue notices the member receives overdue notice for the material whose loan period expired (status *C* and *S*), if the following conditions are fulfilled:

- the member does not have the privilege *No overdue notices*
- after the loan period expiry date, the grace period for the 1st overdue notice in the time parameters table ended (if the grace period is not defined, the member will receive the 1st overdue notice the day after the loan period expires)
- after the date of reception of the previous overdue notice, the grace period for the specific overdue notice (2nd, 3rd and 4th) in the time parameters table ended (if the grace period is not defined, the member will receive a higher overdue notice one day later than the previous overdue notice); the loan period that was renewed after the previous overdue notice was received also expired
- the member did not receive the last overdue notice for the material sent by the library



Note:

For the creation of overdue notices, the privilege LOAN_OVR – Overdue notices is required.



Note:

The procedure of creating overdue notices can be performed only once a day. Also, it is not possible to create overdue notices if you did not print already created overdue notices on a printer.

Procedure

1. Highlight the **Overdue notices** class and select the **Class / Create overdue notices** method.

The **Create overdue notices window** will open where the date of the last overdue notice creation is displayed. In libraries with departments the list of departments which you can access by your username and data on the last overdue notice creation for every department is displayed.

If you have already created overdue notices, but you did not send them yet, a warning message will be displayed in the right window.

2. By clicking the **Create** button you will activate the procedure of creating overdue notices.

In libraries with departments, before doing that you will select the department in which you wish to create overdue notices. You can select several departments or all departments at the same time.



Note:

When creating overdue notices you cannot perform other procedures at the same time, therefore it is recommended to create overdue notices outside working hours of the library or to create a scheduled job. You can activate the procedure of creating overdue notices later by entering date and time in "Execution time". Once the overdue notices are created, you will receive an e-mail notification to your e-mail address.

3. Wait until the **Creation of overdue notices completed** window opens.

Brief statistics for created overdue notices will be displayed in the window. If you activated the procedure for several departments at the same time, brief statistics will be displayed for every department.

4. After clicking the **OK** button, the **Sending of overdue notices** window will open.

It is recommended to send the created overdue notices as soon as possible. The overdue notices are created on the basis of predefined forms (see chapter A.2.6).

In libraries with departments you can select the overdue notices created in individual departments for sending.

If you do not wish to send them yet, click the **Close** button.

5. In the **Note** window you will be asked to confirm the sending of overdue notices.



Note:

Overdue notices that were sent cannot be cancelled!

Overdue notices are sent to the selected destination (usually to printer).

Information on whether a member received an overdue notice can be found in records on material for the member (the **Home library material** window):

- note indicator *OVR* will be displayed in the upper right corner; in libraries with departments this indicator is displayed if the member has an overdue notice in any department; *OVR* indicator is automatically deleted when there is no overdue notice recorded for the member
- date of the last overdue notice receipt is displayed on the list of material in the column *Due/ovrd* (7th column) for the copy
- number of the last received overdue notice is displayed on the list of material in the column *Delay/ovrd/No.* (8th column) for the copy

Information on whether a member received an overdue notice can be also found in member details (the **Member** editor):

- on the **General** tab the "Current overdue notices" check box is ticked; this value is automatically changed when the member has no recorded overdue notices any more
- on the **Info** tab in "Date of last overdue notice" the date when the last overdue notice was sent to the member is displayed
- on the **Info** tab in "No. of overdue notices received" total number of overdue notices received by the member until that day is displayed; this number includes settled and unsettled overdue notices
- on the **Info** tab the "Received overdue notices" check box is ticked if the member received at least one overdue notice until that day; the values are entered automatically and can be changed if you delete the data on received overdue notices for the member manually (see chapter 8.4)
- in libraries with departments the data on the number of received overdue notices and the date of the last overdue notice can be found in the **Details by department** window if you select an individual department and click the **Show** button.

Data on received overdue notices can be found if you select the **Overdue notices** folder on the workspace in the member's related objects or if you select the **Overdue notices - overview** method (see chapter 8.4).

If a library charges costs for overdue notices to members, a debt for overdue notice will be entered automatically when creating overdue notices. You can

view debts for overdue notices for the member by using the **Entering and settling debts** method (see chapter 7.4).



Tip:

You can find created overdue notices in the **Overdue notices** class by using the **Class / Find** method. The colours of the displayed overdue notices define the status of overdue notices. If an overdue notice was created but not yet sent (during the procedure of creating overdue notices or by using the **Overdue notice / Send overdue notices** method), it will be displayed in red. If an overdue notice was already sent, it will be displayed in black. If all the material from the overdue notice was already returned, it will be displayed in green.

8.2 PRINTING OVERDUE NOTICES

Forms for overdue notices are usually printed right after they are created by clicking the **OK** button in the **Sending overdue notices** window. You can print overdue notices later in one of the following ways:

- by using the **Class / Send overdue notices** method if you select the **Overdue notices** class
- by using the **Object / Send** or **Object / Print** method if you click the selected overdue notice
- in the COBISS3/Reports module (see chapter A.2.6).



Note:

*You can also print already sent overdue notices (those are overdue notices in black or green colour) in the COBISS3/Loan module by using the **Object / Send** method or in the COBISS3/Reports module by creating the report L-O-01: Overdue notices. Creating or printing of such report does not influence the status of overdue notice (colour). It also means that if you print unsent overdue notices on a printer, they will remain red.*

The procedure of printing forms for overdue notices by using the method **Class / Send overdue notices** follows:

Procedure

1. Highlight the **Overdue notices** class and select the **Send overdue notices** method.

Data on overdue notices which are created, but not sent yet will be displayed in the **Sending of overdue notices** window. In libraries with departments data on unsent overdue notices is displayed for all departments.

2. Select the overdue notices and confirm the selection by clicking the **Send** button.

Overdue notices are sent to the printer selected for printing overdue notices (logical destinations *Overdue notices (envelopes) – Loan or Printer – Loan*).



Note:

Before printing on a printer it is always recommended to check if the paper is correctly inserted (especially for three layer carbon-copy envelopes).

When creating the report, the list of recipients of overdue notices for which the form for overdue notice was not printed because the member has no postal address is also printed in addition to forms.

Postal address defined to be used on overdue notices is printed on the form for overdue notice (see chapter 3.1.2.1.1). If no address is defined for this purpose, the address will be defined in the following order: permanent address, temporary address, business address, guarantor's/guardian's address, guarantor's/guardian's permanent address, guarantor's/guardian's temporary address, address abroad.

Forms for overdue notices can be printed in two sizes:

- A4 – classical format which enables printing of overdue notices on the paper of A4 size and sending in envelopes with a window on the left or on the right.
- Format of the three layer carbon-copy envelope which enables printing of overdue notices on special envelopes having precise element layout on forms (those are library details, payment of postage, overdue notice recipient, etc.). Printing the list of material is limited in this case. If you are about to send an overdue notice for a large number of copies to a member, several envelopes can be printed depending on the length of the list. An appropriate matrix printer must be used for printing overdue notices on three layer carbon-copy envelope. Data on library, payment of postage and overdue notice recipient are printed on darkened fields. This data can be seen on the front side of the envelope, while the text of the overdue notice (list of material, signatory) can be seen only when the recipient opens the envelope.



Tip:

The contents of overdue notice forms can be defined and maintained by the library in the COBISS3/Loan software module (see chapter 8.5).

8.3 CANCELLING CREATION OF OVERDUE NOTICES

If you find out that you created overdue notices by mistake, you can cancel the procedure of creating overdue notices and restore the state before creating overdue notices.

Precondition

To cancel creation of overdue notice the following conditions must be fulfilled:

- the privilege *LOAN_OVR – overdue notices* must be granted for your username
- overdue notices have not been sent yet
- only overdue notices which were created last can be deleted

Procedure

1. Highlight the **Overdue notice** class and select the **Class / Cancel creation of overdue notices** method.

The **Cancel creation of overdue notices** window will open containing the date of the last creation of overdue notices. The list of departments which you can access with your username and data on the last pcreation of overdue notices for individual department will be displayed in libraries with departments.

2. Hightlight overdue notices that you wish to cancel.

In libraries with departments you can highlight overdue notices for cancellation in one, several or all departments at the same time.

3. By clicking the **Cancel** button you will activate the procedure of cancelling overdue notices.



Note:

The procedure of cancelling overdue notices can be scheduled by entering date and time in "Execution time".

4. Wait until the **Cancel creation of overdue notices** window opens.

Brief statistics of cancelled overdue notices is displayed in the window. If you activated the procedure of cancelling overdue notices for several departments at the same time, brief statistics of cancelled overdue notices will be dispalayed for every department.

Overdue notices created on the selected date are deleted during the procedure of cancelling. It means that data on overdue notices for the member and material for which the member received overdue notice will be deleted. At the same time debt for overdue notice will be also deleted.

8.4 OVERVIEW OF OVERDUE NOTICES

You can view all overdue notices for the member:

- green overdue notices for material that was already returned
- black overdue notices for material that is still on loan
- red overdue notices which were not sent yet

Procedure

1. In the **Member** class, find and select a member.
2. Select the **Object / Overdue notices - overview** method.

The **Overdue notices - overview** window will open, including the list of overdue notices. In libraries with departments, all overdue notices will be displayed regardless of the fact in which department the member received the overdue notice.

3. Highlight one (or several) overdue notices and load it to the workspace by clicking the **Select** button.

8.5 CREATING OVERDUE NOTICE FORMS

The procedure of creating overdue notice forms is intended for creating, editing, activating and deleting overdue notices. The contents of the forms are specified and maintained by the library itself whereas the layout of the forms is specified and maintained by the library information service.



Note:

If the library does not interfere with the procedure of creating overdue notice forms, the default overdue notice forms are used when creating the report LOAN-ON-01: Overdue notices. The default forms contain the basic data and text in the domestic language, the default report format is in A4 format with the member's address on the left side (envelope with clear window on the left side). Default forms cannot be edited or deleted.



Note:

To create overdue notice forms, the privilege LOAN_OVR – Overdue notices is required.



Note:

*If the library already had edited customised texts for creating overdue notices (Postage paid (overdue notice), Introductory text (overdue notice), Conclusion text (overdue notice), Signature on overdue notices) in their user variable definitions, the customised content of the overdue notice forms must be edited with the **Overdue notices / Create overdue notice forms** method.*

Procedure

1. Highlight the **Overdue notices** class and select the **Class / Create overdue notice forms** method.

The **Creation of overdue notice forms** window will open where the data on the currently valid overdue notice forms is displayed. In the beginning, the default forms are active.

2. Select the procedure you wish to use to continue with the activities for maintaining overdue notice forms:
 - Create new forms
 - Edit forms
 - Activate forms
 - Delete forms
3. Once you click the **Select** button, continue with the selected procedure or abort the procedure by clicking the **Exit** button.

8.5.1 Creating new forms

Select the option of creating new overdue notice forms if you wish to create a new group of overdue notice forms. You can create a new group of overdue notice forms on the basis of default forms or with the help of previously prepared forms.

Procedure

1. In the **Creation of new overdue notice forms** window, select the **Create new forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.
The **Create new forms** window will open.
3. In the *Form group* field, enter the name of the new group of forms and confirm by selecting the **OK** button.



Note:

*Groups of new forms are saved in the form of a file, so the following characters must not be used in the name of the form group: <, >, :, ", /, \, |, ?, *.*

The **Form groups** window will open.



Note:

When you create overdue notice forms for the first time, the Form groups window will not open as no new forms had been previously prepared. In this case the data from default forms is used in the new forms.

4. Select one of the previously prepared groups of overdue notice forms, which you can use to prepare new overdue notice forms.
5. Confirm the form group by clicking the **OK** button.

The **Editing data on overdue notice forms** window will open. In the title bar you will also see the name of the new group of forms you will be editing. All data from the group of forms you selected in the previous step will be displayed in the window.

The window is divided in three parts:

In the upper left part of the window is a table, where numeric values, which are used in the selected form group, are displayed. If a library has no departments, there is only one row in the table. If a library has departments, the number of rows in the table equals the number of departments with automated loan. The names of the six columns are displayed in the title bar of the table.

Individual table columns contain:

1. Column 1 – **Applies to**

In libraries with departments, names of departments with automated loan are displayed in individual rows, for which the data specified on the overdue notice forms will be taken into account. In libraries with no departments, there is only one row in this column, where *Home library* is displayed.

2. Column 2 – **Format and address position**

In this column, by clicking the selected table cell, a drop-down list will open, where you can select one value to specify the format and address position. You can select one of the following values:

- 0 – A4 format/address left
- 1 – A4 format /address right
- 2 – three-layer carbon-copy envelope

3. Column 3 – **1st overdue notice**

In the table cell, numeric values for data that is used on the first overdue notice form are displayed.

4. Column 4 – **2nd overdue notice**

In the table cell, numeric values for data that is used on the second overdue notice form are displayed.

5. Column 5 – **3rd overdue notice**

In the table cell, numeric values for data that is used on the third overdue notice form are displayed.

6. Column 6 – **4th overdue notice**

In the table cell, numeric values for data that is used on the fourth overdue notice form, are displayed.



Tip:

If you wish to see a description of numeric values in the table, you can use the screen tip by placing the mouse cursor on the selected cell. The screen tip will successively display the data types that are specified in the selected cell and will be taken into account on the overdue notice form.

In the upper right part of the window, you can select the data type that you wish to edit from the drop-down list. In one group of overdue notice forms, one or more data types can be edited. An individual data type can have different content versions, depending on the number of overdue notice or department where the overdue notice is prepared (in libraries with departments).

When you first edit the data, the default content of an individual data type will be displayed under the selected data type. An individual content version is marked with a number, based on which the selected content is displayed in columns from the first to the fourth overdue notice.

Positions of individual data types on the overdue notice form are displayed on the overdue notice template for A4 format (see figure 8.5-1). These data types can be edited.



Note:

For multi-layer envelopes, restrictions with regard to the quantity of entry of variable data must be taken into account when editing overdue notice forms due to the specified positions of data.

You can select one of the following seven data types:

1. Additional data under the library address

On the default overdue notice forms, only the general library address data is displayed, so this data type is blank in the beginning. On the overdue notice, additional data will be displayed under the general library address (e.g. e-mail address, telephone, fax, opening hours, etc.).

2. Postage (multi-layer carbon-copy envelope)

This data type contains the default value *Postage paid to post office ...*, which specifies the post office number and the name of the post office where overdue notices are sent to members. The default value can be edited or new content version can be added. This data type is edited only if the library uses multi-layer carbon-copy envelopes.

3. Overdue notice number (name)

For this data type, the variable value *%received overdue notice%* is already used, for which the appropriate number of the overdue notice received (1st OVERDUE NOTICE, 2nd OVERDUE NOTICE, 3rd OVERDUE NOTICE, 4th OVERDUE NOTICE) will be automatically displayed. If a library wants to specify a different form of numbering overdue notices or enter the overdue notice name in the text form (e.g. Director's notice, Overdue notice before the lawsuit, etc.), a new content version must be defined, which will be used in the group of overdue notice forms.

4. Introductory text

The data type *Introductory text* has a default general text, which can be edited or you can add new content versions.

5. Conclusion text

The data type *Conclusion text* has a default general text, which can be edited or you can add new content versions.

6. Signature on overdue notices

This data type contains the default general value *library head*. The data can be edited or you can add new content versions.

7. Price display at the end of the overdue notice

For this data type, two variable values, *%received overdue notice price%* and *%current fine%*, which have the introductory phrase, are used as default. In the place of variable values, the relevant price from the valid price list of the library or department (if the price list is different by departments) is automatically displayed on the prepared overdue notices. If a library wants to define a different price display and introductory phrases, the default data type must be edited or new content versions must be defined where the variable values will be used, in the place of which the relevant values will be automatically displayed in the group of overdue notices (see function *Insert variable value* further in this chapter).



Tip:

The library can decide to include their logo or a photo of the signature of the responsible person in the library on the overdue notice report in A4 format.

The logo will be displayed in the overdue notice header (above the address of the overdue notice recipient. If the library decides to include their logo on the overdue notices in A4 format, the logo will also be displayed on registration forms that are saved after the member's signature is confirmed with the signature pad (see chapter 3.1.4).

The picture of the signature is displayed under data type 6 (signature on overdue notices). The library can only use one signature on all overdue notices (it is not possible to use different signatures for each department or a certain number of overdue notices).

To include the logo or signature on overdue notices, the library must send the logo (defined as an image, saved in jpg or gif format, maximum size 25 x 176 mm) and/or the signature (defined as an image, saved in jpg or gif format, maximum size 25 x 80 mm).

IZUM
Institut informacijskih znanosti

← library logo

Testni Član
Prešernova ulica 17
2000 Maribor

Univerza na Primorskem Univeršita' del Litorale
Titov trg 4
6000 Koper - Capodistria
ident. št. za DDV: SI10044264
Knjižnica TEMENA
Glagoljaška 8
6000 Koper - Capodistria
tel.: +386 5 611 75 72
faks: +386 5 611 75 71
e-pošta: temena@upr.si
urnik odprtosti: vsak dan od 7.00 do 19.00

1. Additional data under the library address

23.09.2016

3. Number (name) of the overdue notice

4. OPOMIN

4. Introductory text

Obveščamo vas, da je gradivu, ki ste si ga izposodili, potekel rok izposoje:

Rok: 20.11.2013 TI=Justifying legal punis... AU=Primorac, Igor IN=02000007673
Rok: 20.11.2013 TI=The principles of mora... AU=Bentham, Jeremy IN=02000007669
Rok: 20.11.2013 TI=Outlines of the philos... AU=Hegel, Georg Wilhelm Friedrich IN=02000007584
Rok: 20.11.2013 TI=Broken bodies, shatter... IN=02000001906
Rok: 20.11.2013 TI=Taking rights serious!... AU=Dworkin, Ronald IN=02000007581
Rok: 20.11.2013 TI=The province of jurisp... AU=Austin, John IN=02000007687
Rok: 20.11.2013 TI=Popravki pesniške zbir... AU=Potocco, Marcello IN=02000006523

5. Conclusion text

Vljudno prosimo, da vmete gradivo ter poravnate zamudnino in strošek opomina.

6. Signature on overdue notices

Cena opomina: 4,00 EUR
Zamudnina na današnji dan: 14,00 EUR

7. Price display at the end of the overdue notice

vodja knjižnice

Signature of responsible person in library

stran 1/1

Figure 8.5-1: Overdue notice template with data type display for A4 format

In the bottom part of the window is the “Field for editing the selected data type”, where the content of the data, which is displayed on the overdue notice forms, is edited. You can have different content versions saved for one data type. Each content version is in its own numbered row. For the selected data type, select the desired content version that you wish to edit. The selected content will be displayed in the bottom part of the window, where you can change it accordingly.



Note:

For the data type Additional data under the library address there is no content in the beginning.



Note:

When editing data, the % sign must not be used as it is used only for entering variable values.

Under the field for editing content of the selected data type, the following functions or buttons can be used:

- **Insert variable value**

In the procedure of editing data on forms, the previously prepared variable values can be used, in the place of which the actual value will be automatically displayed. You can insert the following variable values:

- member's total debts
Display of total debts for the member.
- debts of all overdue notices received
Display of total debts of all overdue notices received for the member.
- 1st overdue notice price
Display of the price for the first overdue notice (1ON) according to the valid price list of the library or department, if the price list is different by departments.
- 2nd overdue notice price
Display of the price for the second overdue notice (2ON) according to the valid price list of the library or department, if the price list is different by departments.
- 3rd overdue notice price
Display of the price for the third overdue notice (3ON) according to the valid price list of the library or department, if the price list is different by departments.
- 4th overdue notice price

Display of the price for the fourth overdue notice (4ON), according to the valid price list of the library or department, if the price list is different by departments.

- Current fine
Display of the current fine for the member on the day when preparing the overdue notice.
- fine for books – FIN01
Display of the price for the debt FIN01 according to the valid price list of the library or department, if the price list is different by departments.
- fine for serials – FIN02
Display of the price for the debt FIN02 according to the valid price list of the library or department, if the price list is different by departments.
- fine for non-book material – FIN04
Display of the price for the debt FIN04 according to the valid price list of the library or department, if the price list is different by departments.
- received overdue notice
Display of the relevant overdue notice number or name on the day when preparing the overdue notice
(1st OVERDUE NOTICE, 2nd OVERDUE NOTICE, etc. or e.g. DIRECTOR'S NOTICE).
- received overdue notice price
Display of the price of the overdue notice on the day when preparing the overdue notice according to the valid price list of the library or department (if the price list is different by departments).
- received overdue notice number
If you wish to name the overdue notices differently or use this option also when editing language versions for the creation of forms in other languages, you can use the variable value for the display of the numeric value of the received overdue notice on the day when preparing the overdue notice (e.g. 1 for the first overdue notice, 2 for the second overdue notice, etc.).



Example:

Example of usage:

%received overdue notice number%. notification about a loan period expiry date

In language versions, you can avoid entering different forms of one data type, as all language versions can be edited by using one content version of the data type 3. *Overdue notice number (name)*.

- **Save**

Use this button if you wish to save the changed content version.



Tip:

When editing data, you can use the *Insert variable value* function. By using this function, the selected variable values can be entered, in the place of which the actual value will be automatically displayed on the prepared overdue notices (*received overdue notice number, member's total debts, etc.*).

- **Add**

Use this button when you wish to define new content for the selected data type. You can do this by highlighting the content version under the selected data type, editing it accordingly or updating it and clicking the **Add** button. You can add more content versions for one data type. Each newly added version will get its own current number, which cannot be changed. The order is not always based on the current number.

- **Delete**

Use the button when you wish to delete the defined content version in the upper right part of the window. You can do this by highlighting the content version for the selected data type and clicking the **Delete** button. The content version for this form group will be permanently deleted.



Note:

If the content version is used in the group of overdue notice forms, it cannot be deleted. You will receive an automatic notification about where in the table the content version was used.

- **Up**

Use the **Up** button when you wish to move the selected content version in the upper right part of the window one or more rows up. When you move the content version (row) up, its current number does not change as it is determined by the content version for the data type.

- **Down**

The **Down** button is used when you wish to move the selected content version in the upper right part of the window one or more rows down. When you move the content version (row) down, its current number does not change as it is determined by the content version for the data type.

Buttons for saving and cancelling the creation of overdue notice forms:

- **OK**

Use the **OK** button to save the existing or newly created group of overdue notice forms.

- **Cancel**

Use the **Cancel** button to exit the window for editing data on overdue notice forms without saving.

8.5.1.1 Editing data on overdue notice forms

You can edit data on overdue notices for each overdue notice separately. In the **Editing data on overdue notice forms** window, you can edit data for up to four overdue notices. If a library uses fewer overdue notices (set up by a special parameter upon the library's request), the data is defined only for the number of overdue notices that are sent to its members (e.g. only for the first two overdue notices). A library does not have to edit forms for the following overdue notices as they are not taken into account in the procedure of creating overdue notices.

If a library has more automated departments, the data on forms is edited only for the departments where overdue notices are prepared by performing the procedure of creating overdue notice forms; for other departments, forms do not have to be edited.

In the **Editing data on overdue notice forms** window is a table where numeric values are displayed in individual cells for a specific overdue notice in the home library or in an individual department (in libraries with departments).

There are seven numbers in each cell, separated by a comma, which represent different data types on overdue notice forms. In the beginning, the default value in the cells is *1*; these values, which define the content of displayed overdue notices, can be changed by the library and are the basis for the creation of the report *LOAN-ON-01: Overdue notices*.

Procedure

1. Highlight with a mouse click the selected cell under the desired number of the overdue notice for the home library or for an individual department (applies to libraries with departments).
2. Then in the upper right part of the window, select the desired data type and the content version for this data type from the drop-down list. Double-click to confirm the selected content version to be used on the form. During this procedure, the current number of the content version (displayed in the beginning of the row) will be transferred to the selected cell in the place specified for this data type (e.g. data type 6. *Signature on overdue notices* will be transferred to the sixth place in the cell with the current number of the content version).

Continue editing the overdue notice forms in each cell (depending on the number of overdue notices in the library), until their content is edited for all overdue notices in the home library or in individual departments (applies to libraries with departments).

3. Save the changes in the form groups by clicking the **OK** button.

**Tip:**

In libraries with departments, you can copy the content of an individual cell to other cells (e.g. the content of the 1st overdue notice is the same or similar to all the following overdue notices in other departments).

Perform the copying procedure by highlighting the selected cell and pressing the key combination <Ctrl> + <C>. Then highlight with a mouse click the desired cell or more cells at the same time (e.g. for all overdue notices in all departments) and paste the content by pressing the key combination <Ctrl> + <V>. If only one content version of a specific data type (e.g. 6. Signature on overdue notices) is different for an individual department, change only this content version in the selected cells of this department.

8.5.1.1.1 Language versions of overdue notice forms

A library that enables sending overdue notices to its members in different languages can edit overdue notice forms in several language versions. The overdue notice forms are created in the domestic language but you can create up to five different language versions.

Procedure

1. For the selected data type, in the upper right corner of the **Editing data on overdue notice forms** window, highlight the content version in the domestic language.
2. By clicking the right-hand mouse button, start the procedure of entering additional language versions.

The **Language versions of overdue notices** window will open, which is divided into five fields with different initial rows (1st language version, 2nd language version, etc.).

3. Place the mouse cursor on the field of the selected language version and enter the data in another language. You can enter up to five language versions of the data that will be used when creating the report *LOAN-ON-01: Overdue notices*.

During the procedure of editing data, you can also use the *Insert variable value* function (see chapter 8.5.1).

**Note:**

When editing the data, do not use the % sign, as it is used only for entering variable values.

**Note:**

*A specific language version is taken into account when creating the overdue notice for an individual member provided that the relevant language version is selected for the member in the editor (**Object /Edit method**) under the »Language of overdue notices« attribute (see chapter 3.1.2.1).*

4. Save the changes by clicking the **OK** button.



Note:

Language versions of the data must be entered for the data types for which a library wishes to be displayed on created overdue notices in one of the language versions!

8.5.2 Editing forms

Select the option of editing overdue notice forms if you wish to change or update the data on the already prepared overdue notice forms.

Procedure

1. In the **Creation of overdue notice forms** window, highlight the **Editing forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.

The **Form groups** window will open.



Note:

The default overdue notice forms cannot be edited. If a library has not yet prepared new overdue notice forms and in the beginning uses the Editing forms procedure, a notification will be displayed, informing you that editing default forms is not possible. A library must create new forms on the basis of the default forms.

3. Select one of the previously prepared groups of overdue notice forms and confirm it by clicking the **OK** button.

The **Editing data on overdue notice forms** window will open. In the title row, the name of the group of overdue notice forms that was selected for editing is displayed.

Continue the procedure of editing forms in the **Editing data on overdue notice forms** window in accordance with the instructions (see chapter 8.5.1).

8.5.3 Activating forms

In a library that does not interfere with the procedures of creating overdue notice forms, the default forms are valid. Activate new or already existing groups of overdue notices only after you have edited all the required data (also language versions, if necessary) for the group of overdue notice forms and after you have saved the data.

Procedure

1. In the **Creation of overdue notice forms** window, highlight the **Activating forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.
3. The **Form groups** window will open, where you can select one of the previously created groups of overdue notices that you wish to activate for the procedure of creating overdue notices in the report *LOAN-ON-01: Overdue notices*.

You can also select the default overdue notice forms.

4. Confirm the selected form group by clicking the **OK** button.

The currently valid form group will be displayed in the upper part of the **Creation of overdue notices** window.

8.5.4 Deleting forms

A library can delete the already prepared groups of overdue notice forms if it no longer needs them. By performing this procedure, an individual group of overdue notices will be permanently deleted.

**Note:**

The default overdue notice forms cannot be deleted. Also, the currently valid overdue notice forms cannot be deleted. When selecting the valid form group, you will receive an automatic notification, informing you that the group cannot be deleted.

Procedure

1. In the **Creation of overdue notice forms** window, highlight the **Delete forms** radio button.
2. Confirm the procedure by clicking the **Select** button.
3. The **Form groups** window will open, where you can select one of the prepared groups of overdue notices that you wish to permanently delete.

**Note:**

If there is only one group of overdue notice forms prepared in your library, an automatic question will appear asking you whether you wish to delete this form group.

4. Confirm the selected form group by clicking the **OK** button.

The forms will be deleted only after a question will appear in the window, in which you must confirm the deletion by clicking the **OK** button. You can cancel the procedure of deleting the form group by clicking the **Cancel** button.

5. The selected form group will be deleted and you will be returned to the **Creation of overdue notices** window.

9 CONNECTION TO OTHER SOFTWARE MODULES AND THE LOCAL DATABASE

The following chapter describes the connection between the COBISS3/Loan software module and other modules of the COBISS system and to the local database.

Subchapters:

- COBISS3/Holdings
- COBISS3/Interlibrary loan
- COBISS3/Reports
- COBISS3/Application administration
- Local database
- COBISS/OPAC

9.1 COBISS3/HOLDINGS

The use of the COBISS3/Holdings software module is a precondition for the use of the COBISS3/Loan software module. The details about the individual physical units of material that can be put on loan are maintained within the COBISS3/Holdings software module. Loan is only possible if there is a bibliographic record in the local database and a holdings data description in the COBISS3 database for the material.

One of the classes in the COBISS3/Loan software module is also the **Field 996/997** class, which you can use to search for individual copies and acquire information about their availability (on loan, available) from the relationships. To edit the holdings data or perform other procedures, you need a special privilege for the work with holdings.

In libraries in which loan is organised by departments all copies of material for loan must have sublocation in field 996/997d and in case of relocation of the copy for unspecified period of time in field 996/997e as well.

9.2 COBISS3/INTERLIBRARY LOAN

Within the COBISS3/Interlibrary Loan software module, library members act as customers.

To perform the procedures in interlibrary loan for a member, the privilege *ILL-BASIC – All procedures* is required.

You can see the home library material that you reserved or lent to the member through interlibrary loan in the list of recorded material in the **Home library material** window. Material that is reserved for interlibrary loan can have the status *o – reserved available copy*, *w – waiting on the shelf (reserved)* or *r – reserved unavailable material*. Material that is put on loan through interlibrary loan has the status *m – borrowed through ILL*. For material that was reserved or borrowed through interlibrary loan, you cannot renew loan period, change the due date, record the return or delete reservation of the material in the **Home library material** window. These procedures must be performed in interlibrary loan.

Data on reservations for interlibrary loan can be seen in the list of reservations, which can be displayed by using the **View** method and when search results of the material are displayed in the **Catalogue** window.

9.3 COBISS3/REPORTS

At the moment, you can create the following reports and statistics within the COBISS3/Reports software module:

- list of members (selecting in the search window)
- active members
- list of members with notes
- deleted members
- members – changed details
- list of members with debts
- material by transactions
- list of most requested material
- material in mobile library
- unavailable material in mobile library
- members with material on loan
- material by status
- members and loan period date about to expire
- notification about a loan period expiry date (mail)
- notification about a loan period expiry date (e-mail)
- transactions for member - membership card No.
- transactions for member - ID No.
- transactions involving material
- list of cash register transactions
- list of members with highest number of loans
- list of recipients of overdue notices
- statistics of overdue notices
- list of uncollected debts
- statistics on loan – by type of material/active months
- statistics on loan – by type of material/months
- statistics on loan – by type of material (physical form)/months
- statistics on loan – by UDC (main)/language/active months
- statistics on loan – by UDC (main)/language/months
- statistics on loan – by type of material/member category (school libraries)
- statistics on loan – by class/active months
- statistics on loan – by mobile library stops/member category
- statistics on loan – by financier/material/member category
- statistics on visits – by members by member category/months
- statistics on visits – by members by member category/days
- statistics on visits – by class/months
- statistics on visits – by class/days
- statistics on visits – by municipality/member category
- statistics on visits – by mobile library stop/member category
- statistics on visits – by hours/days
- statistics on visits for transactions – by member category/months

- statistics on visits for transactions – by member category/days
- statistics on visits for transactions – by class/months
- statistics on visits for transactions – by class/days
- statistics on visits for transactions – by municipality/member category
- statistics on visits for transactions – by mobile library stops/member category
- statistics on visits for transactions – by hours/days
- statistics on transactions – by member category/months
- statistics on transactions – by member category/days
- statistics on transactions – by municipality/member category
- statistics on active members – by municipality/member category
- statistics on active member – by member category
- statistics on active members – by mobile library stop/member category
- statistics on active members – by member category (after the year of transition to COBISS3/Loan)
- statistics on active members – by member category (for the year of transition to COBISS3/Loan)

When using specific methods within the COBISS3/Loan software module, you can create the following reports:

- membership card label
- lending form
- returned material
- electronic notifications
- routing lists for serials
- routing details for serials
- routing details for members
- list of members before change of class/grade
- list of members after change of class/grade
- list of inactive members who will be deleted during batch deletion
- list of inactive members with outstanding debts
- price list
- invoice
- cancellation of invoice
- list of cash register transactions for member
- list of invoices after closing cash register
- slip with reservation details
- list of new reservations and cancellations via COBISS/OPAC
- daily list of reservations and cancellations
- overdue notice
- slip with data on the material that was returned to another department
- slip with reservation details on the unavailable set

9.4 COBISS3/APPLICATION ADMINISTRATION

A library can also lend material to library members who are legal entities. These members are entered to the member records under the category *125 – legal entities – external institutions*, whereas the institution, where the members are employed and whose library membership card they are using, must be entered to the partners (a description of the procedure can be found in the *COBISS3/Application Administration* User Manual, see chapter 3). As a result, it is possible to enter and maintain partner data in the COBISS3/Loan software module. In order to enter or change partner details, a special privilege is required.

The type of work a user can do within the COBISS3/Loan software module depends on user privileges related to the username which you used to log in to the COBISS3 software.

9.5 LOCAL DATABASE

A record in the local database must exist for the material you wish to lend.

Upon installation of the COBISS3/Holdings software module, a part of the bibliographic data and the holdings data is transferred from the local database to the COBISS3 database. The bibliographic data is transferred to the **Material** class, the detailed holdings data to the **Field 996/997** class and the **Field 996/997 – acquisition data** class, and the summary holdings data to the **Field 998** class and the **Field 998 – acquisition coordination** class. The entry and maintenance of bibliographic data on the material is still taking place in the local database within the COBISS2 or COBISS3 environment, while the data is also automatically updated in the **Material** class in the COBISS3 environment.

9.6 COBISS/OPAC

Every change in the local database (new material record, new field 996/997, loan, return, de-accessioning) is also visible within COBISS/OPAC.

A library member with an allocated password for authorisation for online COBISS/OPAC within the COBISS3/Loan software module can edit his/her data in My library:

- password
- e-mail address and mobile phone number for notification delivery
- settings for electronic notification

The changes can be seen immediately in the member details within the COBISS3/Loan software module.

A member with a password can also use My library to:

- view material on loan
- view restrictions
- renew the loan period, if the library provides this service
- display or print history of the material on loan
- pay outstanding debts with Moneta, if the service is provided by the library
- send ILL requests
- view pending and closed ILL requests
- reserve the material or cancel the reservation, if the library provides these two services

A REPORTS

Reports for loan purposes are created and printed in the COBISS3/Reports software module. The report layout is predefined. However, you can change the content by entering individual parameters when you prepare the report. You can choose one of the following pre-prepared reports:

- Members
 - LOAN-Mb-01: Selected members
 - LOAN-Mb-02: Active members
 - LOAN-Mb-03: List of members with notes
 - LOAN-Mb-04: Deleted members
 - LOAN-Mb-05: Members – changed details
 - LOAN-Mb-06: Active members – by department
 - LOAN-Mb-07: Statistics of updating member details – students
 - LOAN-Mb-08: List of members with debts
- Material
 - LOAN-Mt-01: Material by transactions
 - LOAN-Mt-02: List of most requested material
 - LOAN-Mt-03: Material in mobile library
 - LOAN-Mt-04: Unavailable material in mobile library
- Members and material
 - LOAN-MM-01: Members with material on loan
 - LOAN-MM-02: Material by status
 - LOAN-MM-03: Members and loan period date about to expire
 - LOAN-MM-04: Notification about a loan period expiry date (mail)
 - LOAN-MM-05: Notification about a loan period expiry date (e-mail)
 - LOAN-MM-06: Recipients of e-mail notification
- Transactions
 - LOAN-TR-01: Transactions for member - membership card No.
 - LOAN-TR-02: Transactions for member - ID No.
 - LOAN-TR-03: Transactions involving material

- LOAN-TR-04: List of cash register transactions
 - LOAN-TR-05: Members with highest number of loans
- Cash register operations
 - LOAN-CRO-01: List of invoices
 - LOAN-CRO-02: List of invoices incl. VAT
 - LOAN-CRO-03: Summary of list of invoices incl. VAT
- Overdue notices
 - LOAN-ON-01: Statistics of overdue notices
- Data export
 - LOAN-EXP-01: List of uncollected debts

Subchapters:

- Creating and printing reports
- Groups and report description

A.1 CREATING AND PRINTING REPORTS

To access the COBISS3/Reports software module from the browser, select **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Loan** folder and select the group that contains the definition of the report you wish to create.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report you wish to create.

3. Select the **Creating reports / Create report** method.

The **Enter parameters for report creation** window will open. When preparing some reports, searching for records or entering the entry parameters is not required.

4. Enter the input parameters and click the **OK** button.

The **Overview and sending of created report** window will open. Use it to send the created report to previously defined or changed destinations. The process of sending reports to their destinations and saving reports is described in the *COBISS3 Basic Guidelines* User Manual (see chapter 4.5.).



Tip:

Before printing the report, you can open and preview it on your screen by clicking the **Preview** button.

A.1.1 Creating and printing scheduled reports

The COBISS3 software enables saving jobs which can be executed later. Currently, only the *Create report* job type which enables you to define the time when the job should start is software-defined for performing scheduled jobs. Execution time for creating scheduled reports is defined in the COBISS3/Reports module, usually for larger reports that should be created outside working hours. You can access the module from the browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Loan** folder and select the group that contains the definition of the report you wish to create.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report for which you wish to create a scheduled task.
3. Select the **Creating reports / Create scheduled report** method.
Based on the selected report definition either the search window or the **Enter parameters for report creation** window will open. When preparing some reports, searching for records or entering the entry parameters is not required.
4. Find and select the reports or define the parameter values that should be taken into account when creating the report.
5. Click the **OK** button.
6. The **Edit job** window will open, where you define a new job:
 - Under "Job name", enter the name, under which the job will be saved in the list of saved jobs. Data is mandatory.
 - Under "Execution time (dd.MM.yyyy HH:mm:ss)", set up the date and time when the job should be carried out.
 - The data under "Status" is entered and changed automatically when you save the job.
 - Under "Job type", the job type *Create report* is already selected.
7. Click the **OK** button.

When you save a new job a message will be displayed about the successful registration of scheduled report creation and the job will receive the status *created*. The saved job can be edited or deleted (the procedure of editing jobs is described in the *COBISS3 Basic Guidelines* User Manual, see chapter 4.8).



Note:

Tasks that are repeated periodically (e.g. every day, every week, every month, etc.) always have the status *created* (and never get the status *completed*).

Once the report is created, a notification about the job will be sent to the e-mail of the librarian who defined the job. In case the report was not created because the conditions for creating the report were not fulfilled or because an error occurred while creating the report, a notification will be sent to the same e-mail address.

If the report is successfully created and after you receive the notification, you can find the saved file which contains the report and send it to destinations.

A.1.2 Browsing stored report files

You can find a saved file in the COBISS3/Reports software module. The module can be accessed from the browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Loan** folder and select the group that contains the definition of the report.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report you created and saved as an XML-file in a predefined folder and you now wish to print or sent by e-mail.
3. Select the **Creating report / Browse stored reports** method.

The **Select report** window will open containing folders with stored reports. Under "Select folder" the name of the folder is displayed containing the saved file with the reports you created based on the selected definition.

4. In the selected folder, select the desired file with the created report- its name will be transferred to "File name."
5. Click the **Open** button.

The **Overview and sending of created report** window will open, from which you can send the prepared report to previously defined or changed destinations (the procedure is described in the *COBISS3 Basic Guidelines* User Manual; see chapter 4.5).

A.2 GROUPS AND REPORTS DESCRIPTION

Reports for loan purposes are created on the basis of the data on the material (i.e. bibliographic data), which is updated by using the COBISS/Cataloguing software module, the holdings data, which is updated by using the COBISS3/Holdings software module, and the member details and the records of material transactions, which are recorded by using the COBISS3/Loan software module.

Loan reports are divided into four basic groups:

- lists of members
- lists of material
- members and material
- transactions
- cash register operations
- overdue notices
- data export

A.2.1 Members

In the **Members** group, you can create lists of members according to different criteria. You can select one of the following report types:

- **LOAN-Mb-01: Selected members** is a report containing a list of members whom you found and selected in the Search – Member search window.
- **LOAN-Mb-02: Active members** is a report containing a list of members for which the date of the last visit still falls within the period specified in the parameter “Period” when creating the report.
- **LOAN-Mb-03: List of members with notes** is a report containing a list of members whom you found and selected in the **Search – Member** search window and for whom a note was entered.
- **LOAN-Mb-04: Deleted members** is a report containing a list of members whose data was deleted within a specified period. The beginning and the end of that period is specified during report creation.
- **LOAN-Mb-05: Members - changed details** is a report containing a list of members whose data was changed within a certain period. The beginning and the end of that period of time is specified during report creation. The report is intended mostly to control the procedure of automatically changing departments or school year in school libraries, as in the “Change” column, department or school year will be displayed before or after the change. In other types of

changes (e.g. changing the member's address), the value will be displayed as the name of the attribute for the member for whom the value was changed.

- **LOAN-Mb-06: Active members - by department** is a report containing a list of members for which the date of the last visit still falls within the period specified in the parameter "Period" when creating the report. The department is specified during report creation. The report can be created only in libraries with departments.
- **LOAN-Mb-07: Statistics of updating member details – students** is a report containing data on the performed update of registered members with data from the reference students database. Entry parameters for the creation of the report are: date of update (mandatory) and type of update. Summary data on the performed updates for members are displayed on the report first, followed by lists of members for each type of update.
- **LOAN-MB-08: List of members with debts** is a report containing a list of members with unsettled debts that were entered within a specified period. The beginning and the end of the period is specified during report creation. In a library with departments you can create a list for an individual department by entering the "Library department" parameter. If the parameter is not specified, all departments will be included in the list.

A.2.2 Material

In the **Material** group, you can create various lists of material based on transactions. You can select one of the following report types:

- **LOAN-Mt-01: Material by transaction** is a report containing a list of material, for which different transactions were performed within a certain period. Before you create the report, you have to specify the type of transaction, the type of material, and the beginning and end of the period.
- **LOAN-Mt-02: List of most requested material** is a report containing the list of most requested material (by number of loans, renewal periods and reservations) within a certain period. The fifty most requested titles are included in the list. Before you create the report, you have to specify the beginning and end of the period and the type of material.
- **LOAN-Mt-03: Material in mobile library** is a report containing a list of material that was delivered to the mobile library. Before you create the report, you have to select the mobile library number (the default value is 1).
- **LOAN-Mt-04: Unavailable material in mobile library** is a report containing a list of material that was delivered to the mobile library

and is entered for members (unavailable). Before you create the report, you have to select the mobile library number (the default value is 1).

A.2.3 Members and material

In the **Members and material** group, you can create various lists of material that is recorded for the members. You can select one of the following report types:

- **LOAN-MM-01: Members with material on loan** is a report which contains a list of members who have material on loan. When you create the report, you can find and select the members in the Search – Member search window first, and then limit the material on loan by entering the parameters. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.
- **LOAN-MM-02: Material by status** is a report which contains a list of material based on its current status. When creating the report, besides the status of the material, you can specify the type of material and the call number. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.
- **LOAN-MM-03: Members with loan period date about to expire** is a report which contains a list of members who have material on loan whose loan period has expired or is about to expire within a certain period. When creating the report, you can specify the beginning and the end of the period, class or grade of the member, member category and study programme. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.
- **LOAN-MM-04: Members with loan period date about to expire** is a report which contains a list of members who have material on loan whose loan period has expired or is about to expire within a certain period of time. The created notifications are intended to be printed to a printer. When creating the report, you can specify the beginning and the end of the period, type of material, department or year and member category. In libraries with departments, notifications are created only for the department in which you are currently signed in as a user. You cannot create a report for all departments at the same time!
- **LOAN-MM-05: Notification about a loan period expiry date (mail)** is a report which contains a list of notifications for the members with a list of material whose loan period has expired or is

about to expire within a certain period of time. The created notifications are intended to be sent by e-mail. When creating the report, you can specify the beginning and the end of the period, type of material, department and member category. In libraries with departments, notifications are created only for the department in which you are currently signed in as a user. You cannot create a report for all departments at the same time!

- **LOAN-MM-06: Recipients of e-mail notification** is a report which contains a list of members who will receive a notification about loan period expiry date by e-mail when creating the report LOAN-MM-05. When creating the report, you must enter the same parameters (beginning and end of the period, type of material, department or year and member category) you enter when creating the report LOAN-MM-05. In libraries with departments specify the department in which you created the LOAN-MM-05 report in the "Library department" parameter. If you do not specify the parameter, the list will be created for all departments!



Tip:

The text of the notification about loan expiry date (LOAN-MM-04 and LOAN-MM-05) can be altered any way you like. In order to do so, copy the standard variables *Introductory text (LOAN-MM-04, LOAN-MM-05)* and *Conclusion text (LOAN-MM-04, LOAN-MM-05)* to the user variables and change the text accordingly. In a similar way, you can also change the signature on the notifications (*Signature on notifications* variable).

A.2.4 Transactions

In the **Transactions** group of reports, you can create a list of transactions for a specific member or a list of transactions for a specific item of material. To create and print any of the reports from this group, a special privilege is required.



Note:

To create and print any list from this group, the privilege RPT_SPC – Special privileges in reports is required.

You can select one of the following report types:

- **LOAN-TR-01: Transactions for member – membership card No.** is a report which contains a list of transactions for a selected member within a certain period. When creating the report, you can specify membership card number, beginning and end of the period and type of transaction. In libraries with departments you can create a list for individual department by entering the "Library

department" parameter. If you do not specify the parameter, the report will be created for all departments.

- **LOAN-TR-02: Transactions for member – ID No.** is a report which contains a list of transactions for a selected member within certain period. Unlike the report LOAN-TR-01, the member is specified via the ID number (attribute "Member ID") and not the membership card number, which can change when the member receives a new membership card. When creating the report you can specify the beginning and the end of the time period and the type of transaction. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.
- **LOAN-TR-03: Transactions involving material** is a report which contains a list of transactions for a selected copy of material within a certain period. When creating the report you can specify the item's accession number, the beginning and the end of the time period and the type of transaction. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.
- **LOAN-TR-04: List of cash register transactions** is a report which contains a list of cash register transactions, entered by a specific member within a certain period. When creating the report, select the username (attribute "Entered by") or leave it blank, if you wish to include all usernames. If necessary, you can also define the criteria for other attributes in the window for entering query parameters (e.g. "Transaction type", "Entered", "Reason for deletion/writing off debts, etc."). In a library with departments, you can create a list for individual departments by entering the "Library department" parameter. If the parameter is not defined, the list will be created for all departments. At the end of the reports is a summary display of cash register transactions by username and type of cash register transaction.
- **LOAN-TR-05: Members with highest number of loans** is a report which contains a list of members with the highest number of outside loans in a specific period (number of loan renewals is not taken into account!). The list contains fifty members with the highest number of loans. When creating the report, specify the start and end of the period. If necessary, you can, by entering the input parameters »Member category« and »Type of material«, specify whether the report will be created for all members and for all material or only for the selected members and the selected material.

In a library with departments you can create a list for an individual department by entering the »Library department« parameter. If the parameter is not defined, the list will be created for all departments.

A.2.5 Cash register operations

In the **Cash register operations** group of reports you can create lists related to cash register operations.

You can select one of the following report types:

- **LOAN-CRO-01: List of invoices is a report** which contains a list of settled debts and cancelled settlements within a certain period. When creating the report you can specify the beginning and the end of the period and the username. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments. The report contains a list of all transactions within a certain period. It also contains cancelled settlements for which the amount is displayed as a negative value. A list of non-cash payments outside the library (e.g. payments with Moneta in the My library service) will be displayed on a special form.
- **LOAN-CRO-02: List of invoices incl. VAT** is a report containing all transactions of debts settlement within a specified period including data on VAT. All types of debts settlement (cash and non-cash, in library and outside library) are included. When creating the report you can specify the beginning and the end of the period and the transactions, debts, or services that should be included in the report creation. In a library with departments, you can create a list for individual departments by entering the "Library department" parameter. If the parameter is not defined, a list will be created for all departments. In the second part of the report, data on unsettled debts will be displayed in summary by the method of payment, type of service and the VAT rate.
- **LOAN-CRO-03: Summary of list of invoices incl. VAT** is a report containing a list of all transactions of debts settlement with data on VAT by days within a specified period. Unlike the LOAN-CRO-02 report, the data in the report are displayed in summary by individual days in the specified period. In the second part of the report, data on unsettled debts are displayed in summary by the type of service and VAT rate.

A.2.6 Overdue notices

In the **Overdue notices** group of reports you can print forms for overdue notices and prepare a list of recipients of overdue notices.

You can select one of the following report types:

- **LOAN-ON-01: Overdue notices** is a report intended for printing forms for overdue notices. In that way, you can repeat printing of overdue notices, if you have already sent them upon their creation,

since it is not possible to print them by using the method **Send overdue notices** in the COBISS3/Loan software module any more. This report is also used when an error occurs while printing on a printer and when the forms must be re-printed.

When creating the report, the **Search – Overdue notices** search window will open. Use it to find the overdue notices you wish to print (e.g. by entering the date in "Entered" you can search for overdue notices created on a given day).

Besides the forms, a list of recipients without address will be also prepared when creating this report. Overdue notice is not printed. Overdue notices are not printed for members who have no postal address.



Note:

Printing overdue notices from the COBISS3/Reports software module does not affect the status of overdue notice. This means that the created overdue notices, displayed after the report is created in the COBISS3/Reports software module, should be send by using the method for sending in the COBISS3/Loan software module (the created overdue notice is not printed on a printer), otherwise you will not be able to create new overdue notices.



Note:

Before printing to a printer it is recommended to check if the paper is correctly inserted (especially for the envelopes).

- **LOAN-ON-02: List of recipients of overdue notices** is a list of members who received an overdue notice. Besides member details, data on material with overdue notice is also displayed. When creating this report enter the date of creating overdue notices. If you enter two different date in the parameter "Date of creating overdue notices", the report will contain all overdue notices created within the selected period. In libraries with departments you can create the report for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

On overdue notice forms, different types of data can be changed; for this reason, a library can customize the content and to some extent also the form of the forms according to the needs of the library. You can find more information on the options of creating overdue notice forms in chapter 8.5.

- **LOAN-ON-03: Statistics of overdue notices** contains statistics of created overdue notices for the period specified with start and end date. For each day when the overdue notices were created, the following data will be displayed for an individual overdue notice (1st, 2nd, 3rd, and 4th overdue notice): number of members who received an overdue notice, and a number of items for which they received an overdue notice. If you enter two different dates under

the »Overdue notices created on« parameter, all overdue notices, created for the selected period, will be taken into account. In a library with departments you can create a list for an individual department by entering the »Library department« parameter. If the parameter is not specified, the list will be created for all departments.

A.2.7 Data export

In the **Data export** group, you can prepare data for further editing in other programmes (e.g. Excel), or for the needs of data delivery outside the library.

You can select one of the following reports:

- **LOAN-EXP-01: List of uncollected debts** is a report containing summary data on entered material for which the last overdue notice was issued. The last overdue notice is specified by a special parameter upon the library's request. The report is located in the *Data for further processing* folder. When creating the report, you must specify the »Last overdue notice received« input parameter, where you enter the number of the last overdue notice that library members can receive (the highest number of overdue notices that can be received by members is specified by a special parameter).

If necessary, limit the report by entering the period of receiving the last overdue notice. If you wish to include all the material with the last overdue notice, do not specify the parameter. In a library with departments, you can create a report for an individual department by entering the »Transaction department« where the member received the last overdue notice. If the parameter is not specified, the report will be created for all departments. Under »Membership card number« parameter, you can specify the membership card number for the member if necessary. If the parameter is not specified, the report will be created for all members.

The report is intended to export data to Excel and to further process the data. You cannot print to printer immediately.

When the report is prepared, save it to a folder in the **Overview and sending of created report** window by clicking the **Save as** button. In Excel, open the file containing the report. When importing data, click the "Delimited" radio button, select the value *65001: Unicode (UTF-8)* from the list, and separate the data by using the "|" sign, which you enter under "Other".

Data export contains the following data:

- Membership card number
- Name
- Surname
- Guardian/guarantor
- Street/number

- Postcode and city
(Note: a member's address is the same as used for the last overdue notice)
- Telephone number
(Note: all telephone numbers of the member are taken from e-notifications and member's address details)
- Date of last overdue notice
- Cost of last overdue notice
- Current fine
(Note: data on current fine is related to the copy of the material)
- Purchase price for the item
- Department
- Accession number
- Item title
- Date of loan
- Due date

B STATISTICS

This appendix describes the statistics in the field of loans.

The statistics are created and printed in the COBISS3/Reports software module. The form of a report is predefined, but you can modify its contents by entering individual parameters when creating the report.

Depending on the way the reports are used, the report definitions are divided into two large groups. These are:

- ***Statistics***

This group contains statistics that only use classifications from the report definition.

- ***Statistics (user classifications)***

In this group of statistics you can select the classification you wish to use in the statistical report when creating the report.

In the ***Statistics*** group the statistics are divided into the following groups:

- Mt: Loan of material
- T: Transactions
- VT: Calculation of no. of visits
- A: Active members

In the ***Statistics (user classifications)*** group the statistics are divided into the following groups:

- Mb: Members
The group has two subfolders, in which the statistics are stored based on whether the member data is taken from the loan transaction files of the members database.
- V: Calculation of no. of visits
- T: Transactions
The group has the subfolder Mobile library, in which the statistics for the purposes of the mobile library are stored.
- CR: Cash register

The statistics in the group **Mt** are created based on the data in the **Transactions** class and in the related **Field 996/997** class. Statistics in the group **T** are created based on the data in the **Transactions** class and the related **Field 996/997** and **Member** classes. Statistics in the groups **V**, **VT** and **Mb** are created based on the data in the **Transactions** class and in the related **Member** class. Statistics in the group **CR** are created based on the data in the **Transactions in the cash register** class and the related **Member** class.

Each statistics has its own designation and name. The designation is comprised of the module designation (LOAN), the designation, which shows that it belongs to the report in the statistics group (STA), the designation of the statistics group (Mt, T, V, VT, A, Mb or CR) and the sequential number of the report in the group; all designation elements are separated with the "-" character. The criteria for classifying data separated with the "/" character are evident from the name of the statistic.

B.1 LIST OF REPORTS

The list of reports is in the folders:

- **Reports / Standard / Loan / Statistics**
- **Reports / Standard / Loan / Statistics (user classifications)**

You can choose among the following statistics in the **Statistics** folder:

- Loan of material
 - LOAN-STA-Mt01: Loan – by type of material/active months
 - LOAN-STA-Mt02: Loan – by type of material/months
 - LOAN-STA-Mt03: Loan – by type of material (physical form)/months
 - LOAN-STA-Mt04: Loan – by UDC (main)/language/active months
 - LOAN-STA-Mt05: Loan – by UDC (main)/language/months
 - LOAN-STA-Mt06: Loan – by type of material/member category (school libraries)
 - LOAN-STA-Mt07: Loan – by class/active months
 - LOAN-STA-Mt08: Loan – by UDC (detailed)/language/active months
 - LOAN-STA-Mt09: Loan – by UDC (main)/intended purpose/languages/active months
 - LOAN-STA-Mt10: Loan – by material ratio/member category
 - LOAN-STA-Mt11: Loan – by mobile library stops/member category/active months
 - LOAN-STA-Mt12: Loan – by financier/material/member category
- Transactions
 - LOAN-STA-T01: Transactions – by member category/months
 - LOAN-STA-T02: Transactions – by member category/days
 - LOAN-STA-T03: Transactions – by municipality/member category
- Calculation of no. of visits
 - LOAN-STA-VT01: Visits by members – by member category/months (transactions)
 - LOAN-STA-VT02: Visits by members – by member category/days (transactions)
 - LOAN-STA-VT03: Visits by members – by class/months (transactions)
 - LOAN-STA-VT04: Visits by members – by class/days (transactions)
 - LOAN-STA-VT05: Visits by members – by municipality/member category (transactions)

- LOAN-STA-VT06: Visits by members – by mobile library stops/member category (transactions)
- LOAN-STA-VT07: Visits by members – by hours/days (transactions)
- Active members
 - LOAN-STA-A01: Active members – by member category (school libraries)
 - LOAN-STA-A02: Active members – by member category
 - LOAN-STA-A03: Active members – by municipality/member category
 - LOAN-STA-A04: Active members – by mobile library stops/member category

In the **Statistics (user classifications)** folder you can choose one of the following statistics:

- Members

The **Members (member details from loan transaction files)** subfolder contains definitions of statistical reports, for which the member data is taken from the loan transaction files:

- LOAN-STA-Mb01: By member category
- LOAN-STA-Mb02: By member category/gender
- LOAN-STA-Mb03: By municipality/member category
- LOAN-STA-Mb04: by mobile library stop (at the member)/member category
- LOAN-STA-Mb05: By department/member category/month
- LOAN-STA-Mb06: By department/member category/age
- LOAN-STA-Mb07: By department/member category/month
- LOAN-STA-Mb08: By department/gender/age
- LOAN-STA-Mb09: By department/gender/member category
- LOAN-STA-Mb10: By department/municipality/member category
- LOAN-STA-Mb11: By municipality of mobile library stop/mobile library stop (at the member)/member category
- LOAN-STA-Mb12: By university/member category/university in eVŠ

The **Members (member details from the members database)** subfolder contains definitions of statistical reports, for which the member data is taken from the members database:

- LOAN-STA-Mb31: By member category (members database)
- LOAN-STA-Mb32: By member category/gender (members database)
- LOAN-STA-Mb33: By municipality/member category (members database)
- LOAN-STA-Mb34: By mobile library stop/member category (members database)

- LOAN-STA-Mb35: By department/member category (members database)
- LOAN-STA-Mb36: By department/member category/age (members database)
- LOAN-STA-Mb37: By department/member category/month (members database)
- LOAN-STA-Mb08: By department/gender/age
- LOAN-STA-Mb39: By department/gender/member category (members database)
- LOAN-STA-Mb40: By department/municipality/member category (members database)
- LOAN-STA-Mb41: By municipality of mobile library stop/mobile library stop/member category (members database)
- LOAN-STA-Mb42: By university/member category/university in eVŠ (members database)
- Calculation of no. of visits
 - LOAN-STA-V10: By hour/day of the week
 - LOAN-STA-V11: by day of the month/hour
 - LOAN-STA-V12: By member category/month
 - LOAN-STA-V13: By department/member category/month
 - LOAN-STA-V14: By department/months/gender/age
 - LOAN-STA-V15: By department/month/municipality/member category
 - LOAN-STA-V16: By department/month/member category
 - LOAN-STA-V17: By department/hour/member category
 - LOAN-STA-V18: By department/hour/day of the month
 - LOAN-STA-V19: By department/month/department of registration
 - LOAN-STA-V20: By stop/member category/month
- Transactions
 - LOAN-STA-T10: By intended purpose
 - LOAN-STA-T11: By intended purpose/language/675s
 - LOAN-STA-T12: By intended purpose/physical form (record type)/675s
 - LOAN-STA-T13: By 675s/intended purpose
 - LOAN-STA-T14: By municipality
 - LOAN-STA-T15: By municipality/member category
 - LOAN-STA-T16: By shelving UDC/physical form (record type) – AV collection
 - LOAN-STA-T17: By shelving UDC/physical form (material type) – music CDs
 - LOAN-STA-T18: By shelving location/year of accessioning
 - LOAN-STA-T19: By physical form (record type)/intended purpose/shelving UDC (C,P,M,L)/675s
 - LOAN-STA-T20: By physical form (material type)/intended purpose

- LOAN-STA-T21: By financier/675s/member category
- LOAN-STA-T22: By acquisition type/sublocation/shelving UDC/year of accessioning
- LOAN-STA-T23: By acquisition type/675s/sublocation/year of accessioning
- LOAN-STA-T24: By username/hour/day of the month
- LOAN-STA-T25: By department/transaction type
- LOAN-STA-T26: By department/shelving UDC/physical form (record type) – AV collection
- LOAN-STA-T27: By department/675s/month
- LOAN-STA-T28: By department/675s/intended purpose
- LOAN-STA-T29: By department/intended purpose
- LOAN-STA-T30: By department/intended purpose/age/675s
- LOAN-STA-T31: By department/intended purpose/hour/day of the month
- LOAN-STA-T32: By department/language/member category/675s
- LOAN-STA-T33: By department/month
- LOAN-STA-T34: By department/month/hour/day of the week
- LOAN-STA-T35: By department/physical form (record type)/month
- LOAN-STA-T36: By department/physical form (record type)/sublocation
- LOAN-STA-T37: By department/physical form (record type)/language/intended purpose
- LOAN-STA-T38: By department/physical form (record type)/intended purpose/member category
- LOAN-STA-T39: By department/physical form (record type)/intended purpose/month
- LOAN-STA-T40: By department/physical form (record type)/member category
- LOAN-STA-T41: By department/username/transaction type
- LOAN-STA-T42: By department/transaction type/675s
- LOAN-STA-T43: By department/transaction type/hour/day of the month
- LOAN-STA-T50: By intended purpose/language (domestic/foreign)/675s
- LOAN-STA-T51: By department/language (domestic/foreign)/member category/675s
- LOAN-STA-T52: By department/physical form (record type)/language (domestic/foreign)/intended purpose
- LOAN-STA-T53: By type of material (books and brochures, serials, integrating resources, other)
- LOAN-STA-T54: By intended purpose/physical form/675s
- LOAN-STA-T55: By shelving UDC/physical form – AV collection
- LOAN-STA-T56: By department/shelving UDC/physical form – AV collection
- LOAN-STA-T57: By physical form/intended purpose/shelving UDC (C,P,M,L)/675s
- LOAN-STA-T58: By physical form/intended purpose

- Mobile library

The **Mobile library** subfolder contains definitions of statistical reports, intended for libraries that also have a mobile library:

- LOAN-STA-T44: By stop (at the member)/member category
- LOAN-STA-T45: By stop (at the member)/physical form (record type)/intended purpose
- LOAN-STA-T46: By stop (at the member)/675s/intended purpose
- LOAN-STA-T47: By stop (at the member)/transaction type
- LOAN-STA-T48: By stop (at the member)/transaction type/day of the week
- LOAN-STA-T49: By mobile library stop/intended purpose/physical form (record type)/675s
- LOAN-STA-T59: By mobile library stop/intended purpose/physical form/675s

- Cash register

- LOAN-STA-CR01: By service type (code list)/month
- LOAN-STA-CR02: By service type (description)/month
- LOAN-STA-CR03: By department/service type (code list)
- LOAN-STA-CR04: By service type (code list)/member category
- LOAN-STA-CR05: By service type (code list)/day of the month (selection)
- LOAN-STA-CR06: By service type (code list)/day of the month
- LOAN-STA-CR07: By department/service type (code list)/department of registration
- LOAN-STA-CR08: By username/service type (description)
- LOAN-STA-CR09: By service type (description)/days of the month (selection)

B.2 SELECTING DATA FOR REPORT CREATION

Data selection criteria for individual reports:

- Statistics LOAN-STA-VT01, LOAN-STA-VT02, LOAN-STA-VT03, LOAN-STA-VT04, LOAN-STA-VT05, LOAN-STA-VT06, LOAN-STA-VT07, LOAN-STA-V10, LOAN-STA-V11, LOAN-STA-V12, LOAN-STA-V13, LOAN-STA-V14, LOAN-STA-V15, LOAN-STA-V16, LOAN-STA-V17, LOAN-STA-V18, LOAN-STA-V19 in LOAN-STA-V20

Transaction 52 – *change of data via COBISS+ and mCOBISS*¹ is only taken into account if you create a statistic for all departments (i.e. if you do not specify the parameter "Library department"). Change of data via COBISS+ and mCOBISS namely does not depend on an individual library department.

- Statistics in groups *Calculation of no. of visits*

The rules for calculating the number of visits are described in the document *Calculation of number of visits and active members* that is published on the Training portal along with the COBISS3/Loan software manual.

- Statistics of active members (from LOAN-STA-A01 to LOAN-STA-A04)

The rules for calculating the number of visits are described in the document *Calculation of number of visits and active members* that is published on the Training portal along with the COBISS3/Loan software manual.

¹ Your country may use an older version of the online catalogue COBISS/OPAC.

B.3 ENTERING INPUT PARAMETERS FOR REPORT CREATION

You specify the criteria for data selection in the **Enter parameters for report creation** window.

B.3.1 Statistics in the groups *Loan of material* (from LOAN-STA-Mt01 to LOAN-STA-Mt12) and *Transactions* (LOAN-STA-T01, LOAN-STA-T02, LOAN-STA-T03)

When creating statistical reports specify the values of the following parameters:

- "Period"

Specify the period for which the data should be considered in the statistical report. Parameter entry is mandatory.

- "Library department"

From the code list of departments select the departments for which the data should be taken into account in the statistical report.

Department selection is not mandatory. If you do not specify the departments, the statistical report takes into account the data for all departments.

- "Transaction"

Select the transactions that should be taken into account in the statistical report.

In the statistical group *Loan of material* the following transactions are selected by default: *outside loan, reading room loan, loan renewal, change of due date, reading room transactions, renewal via telephone, renewal via COBISS+ and mCOBISS*¹. If none of the transactions is selected, all transactions will be taken into account in the statistical report of this group.

Parameter entry is mandatory in statistical reports of the group *Transactions*. Only the selected transactions will be taken into account when creating statistical reports in this group.

- "Username"

You can specify for which usernames the transactions should be taken into account in the statistical report.

¹ Your country may use an older version of the online catalogue COBISS/OPAC.

Under the username *EBookService* the loan transactions through Biblos are taken into account. You select this username if you want to create a statistical report through Biblos.

Under the username *OPAC* the transactions through COBISS+ and mCOBISS² are taken into account.

Parameter entry is not mandatory. If no username is selected, the statistical report takes into account all transactions from all users.

A default code list with non-personal usernames is available for the parameter (the username *OPAC* for transactions entered through COBISS+ and mCOBISS² and the username *EBookService* for transactions of loaning e-books through Biblos). If you want to access all usernames (including personal ones) in the code list, use the method **Home library / Expand username code list for reports**. If you want to return to only seeing the non-personal usernames, use the same method again.

B.3.2 Statistics in the group *Calculation of no. of visits (from LOAN-STA-VT01 to LOAN-STA-VT07)*

When creating statistical reports specify the value of the following parameters:

- "Period"

Specify the period for which the data should be considered in the statistical report. Parameter entry is mandatory.

- "Library department"

From the code list of departments select the departments for which the data should be taken into account in the statistical report.

Department selection is not mandatory. If you do not specify the departments, the statistical report takes into account the data for all departments.

- "Username"

Specify for which usernames the statistical report of visits is created.

Under the username *EBookService* the loan transactions through Biblos are taken into account. You select this username if you want to create a statistical report through Biblos.

Under the username *OPAC* all transactions through COBISS+ and mCOBISS³ are taken into account.

² Your country may use an older version of the online catalogue COBISS/OPAC.

³ Your country may use an older version of the online catalogue COBISS/OPAC.

Parameter entry is not mandatory. If no username is selected, the statistical report takes into account the data for all usernames.

- "Transaction"

If you want to take into account only some member activities when counting visits, you specify the activities with this parameter (if, for example, you are only interested in the member visits regarding the return of material, select only the transaction *17 – return/delete material from member's records*).

You specify the value of the parameter in the **Parameters** tab. Parameter value specification is mandatory.

B.3.3 Statistics in the group *Active members* (from LOAN-STA-A01 to LOAN-STA-A04)

When creating statistical reports specify the value of the following parameters:

- "Period"

Specify the period for which the data should be considered in the statistical report. Parameter entry is mandatory.

- "Library department"

From the code list of departments select the departments for which the data should be taken into account in the statistical report.

Department specification is not mandatory. If you do not specify the departments, the statistical report takes into account the data for all departments.

The parameter is not available in the statistic *LOAN-STA-A01*.

- "Transaction"

Select which transactions (which member activities) should be taken into account when creating the statistical report of active members.

The following transactions are selected by default: *member registration, updating temporary note about the material, outside loan, reading room loan, reserving currently unavailable material, reserving available material, loan renewal, return/delete material from member's records, return with restriction, entering loss of material, change of member data, copy de-accessioning, change of due date, start of routing, visit by member (internet access), reading room reservation, renewal via telephone, end of routing, payment entry, visit by member (reading room), member activity with equipment, interlibrary loan, interlibrary return, online registration, change of data via COBISS+ and mCOBISS⁴, change of number, reserving currently unavailable*

⁴ Your country may use an older version of the online catalogue COBISS/OPAC.

material via COBISS+ and mCOBISS⁴, reserving available material via COBISS+ and mCOBISS⁴, renewal via COBISS+ and mCOBISS⁴, cancellation of reservation via COBISS+ and mCOBISS⁴, visit by member – miscellaneous.

Parameter entry is not mandatory. If no transaction is selected, all transactions are taken into account when creating the statistical report.

- "Username"

Under the username *EBookService* the loan transactions through Biblos are taken into account. You select this username if you are interested in the members that actively use Biblos.

Under the username *OPAC* all transactions through COBISS+ and mCOBISS⁴ are taken into account. You select this username if you are interested in members that actively use COBISS+ and mCOBISS⁴.

Parameter entry is not mandatory. If no username is selected, all usernames are taken into account when creating the statistical report.

B.3.4 Statistics in the group *Members* (from LOAN-STA-Mb01 to LOAN-STA-Mb12 and from LOAN-STA-Mb31 to LOAN-STA-Mb42)

When creating the statistical report specify the value of the following parameters:

- "Period"

Specify the period that should be taken into account when creating the statistical report of active members.

Parameter entry is mandatory.

- "Library department"

From the code list of departments select the departments for which the data should be taken into account in the statistical report.

Parameter entry is not mandatory. If you do not specify the departments, the statistical report takes into account the data for all departments.

- "Transaction"

Select which transactions should be taken into account as member activity in the statistical report of the number of active members.

The following transactions are selected by default: *member registration, updating temporary note about the material, outside loan, reading room loan, reserving currently unavailable material, reserving available material, loan renewal, return/delete material from member's records, return with restriction, entering loss of material, change of*

member data, copy de-accessioning, change of due date, start of routing, visit by member (internet access), reading room reservation, renewal via telephone, end of routing, payment entry, visit by member (reading room), member activity with inventory, interlibrary loan, interlibrary return, online member registration, change of data via COBISS+ and mCOBISS⁵, change of number, reserving currently unavailable material via COBISS+ and mCOBISS⁵, reserving available material via COBISS+ and mCOBISS⁵, renewal via COBISS+ and mCOBISS⁵, cancellation of reservation via COBISS+ and mCOBISS⁵, visit by member – miscellaneous.

Parameter entry is not mandatory. If no transaction is selected, all transactions are taken into account when creating the statistical report of active members.

If you would like to create a statistical report of newly registered members, select the transactions *1 – member registration* or *51 – online member registration* when creating the statistical report.

- "Member category"

Specify member categories that should be taken into account in the statistical report.

Members will be selected based on member category entered in the data on transactions you included in report creation. This means that the statistical report takes into account the member category when performing the transaction. This category is not necessarily equal to the current member category in the members database, because this member data can be changed.

Parameter entry is not mandatory. If the parameter value is not specified, the statistical report takes into account members of all categories.

- "Permanent residence municipality"

You can specify that the statistical report only includes members from the selected permanent residence municipalities.

The members will be selected based on the permanent residence municipality entered in the data on transactions that you included into report creation. This means that the statistical report takes into account the municipality of permanent residence when the transaction was performed, but it does not necessarily mean that it is the same as the permanent residence municipality of the member entered in the members database, because this member data can be changed.

Parameter entry is not mandatory. If the value of the parameter is not specified, the statistical report takes into account members from all municipalities.

- "Mobile library stop"

⁵ Your country may use an older version of the online catalogue COBISS/OPAC.

You can specify that the statistical report includes only member activities at selected mobile library stops. This means the mobile library stop where member transaction has been entered and not the mobile library stop that can be entered in the member data.

Parameter entry is not mandatory. If the parameter value is not specified, the statistical report takes into account member activities in the stationary and in the mobile library.

- "Department of registration"

You can specify that the statistical report includes only activities of members registered in the selected departments.

- "Username"

Under the username *EBookService* the loan transactions through Biblos are taken into account. You select this username if you want to create a statistical report of members who actively use Biblos.

Under the username *OPAC* all transactions through COBISS+ and mCOBISS⁶ are taken into account. You select this username if you are interested in the number of members who actively use COBISS+ and mCOBISS⁶.

Parameter entry is not mandatory. If no username is selected, the statistical report takes into account all usernames.

- "Classification link"

In the **Statistical parameters** tab you can specify that the statistical report takes into account a classification different from the default classification specified with the standard of the individual statistic. The tab will show as many classification links as there are included in the individual statistical report. If, for example, you classify the data on statistic of active members according to two characteristics (category and permanent residence municipality), the links to these two classifications (by category and municipality) will be available.

If you click the **Classification link** button, the **Select classification definition** window will open. You can choose from system defined or user defined classifications. Select the classification you want to use for statistical report creation. You can only select the classification by the same characteristic (e.g. in the classification link by member category you can only choose from different classifications by member categories and you cannot choose the classification by gender).

After you click the **OK** button, the link to the selected classification is defined.

You can also specify if the categories in each classification are in descending or in ascending order; if you do not specify this, the categories are classified in no particular order.

The classification selected in the **Statistical parameters** option during report creation is only taken into account when creating the report. The

⁶ Your country may use an older version of the online catalogue COBISS/OPAC.

next time you create the report the classification defined in the report will be taken into account by default.

B.3.5 Statistics in the group *Transactions* (from LOAN-STA-T10 to LOAN-STA-T59)

When creating the statistical report specify the values of the following parameters:

- "Period"
Specify the period that should be taken into account in the transaction statistic.
Parameter entry is mandatory.
- "Transaction"
Select the transactions that you would like to include in the statistical report.
Parameter entry is not mandatory. If no transaction is selected, all transactions are taken into account in the statistical report.
- "Bibliographic level"
You select the bibliographic level if you want to include only the material of a specific bibliographic level in the statistical report.
Parameter entry is not mandatory. If you do not specify the value of the parameter, transactions with all material are taken into account in the statistical report.
- "Library department"
From the code list of departments select the departments for which the data should be taken into account in the statistical report.
Parameter entry is not mandatory. If you do not specify the departments, the statistical report takes into account the data for all departments.
- "Username"
Under the username *EBookService* the loan transactions through Biblos are taken into account. You select this username if you want to create a statistical report of members who actively use Biblos.

Under the username *OPAC* all transactions through COBISS+ and mCOBISS⁷ are taken into account. You select this username if you are interested in the number transactions through COBISS+ and mCOBISS⁷.

⁷ Your country may use an older version of the online catalogue COBISS/OPAC.

Parameter entry is not mandatory. If no username is selected, the statistical report takes into account transactions for all usernames.

- "Transactions" search window

You find and select the data for creating statistics LOAN-STA-T16, LOAN-STA-T17, LOAN-STA-T18, LOAN-STA-T22, LOAN-STA-T23, LOAN-STA-T26, LOAN-STA-T55 and LOAN-STA-T56 in the search window of the **Transactions** class.

- "Member category"

You can specify the parameter when creating statistical reports LOAN-STA-T15, LOAN-STA-T21, LOAN-STA-T32, LOAN-STA-T38, LOAN-STA-T40, LOAN-STA-T44 and LOAN-STA-T51.

With this parameter you can specify that the statistical report includes only transactions of selected member categories.

Members will be selected based on member category entered in the data on transactions you included in report. This means that the statistical report takes into account the member category when performing the transaction. This category is not necessarily equal to the current member category in the members database, because this member data can be changed.

Parameter entry is not mandatory. If the parameter value is not specified, the statistical report takes into account members of all categories.

- "Permanent residence municipality"

You can specify the parameter when creating statistical reports LOAN-STA-T14, LOAN-STA-T15 and LOAN-STA-T21.

With this parameter you can specify that the statistical report only includes transactions of members from the selected permanent residence municipalities.

The transactions will be selected based on the permanent residence municipality entered in the data on transactions that you included into report creation. This means that the statistical report takes into account the municipality of permanent residence when the transaction was performed, but it does not necessarily mean that it is the same as the permanent residence municipality of the member entered in the members database, because this member data can be changed.

Parameter entry is not mandatory. If the value of the parameter is not specified, all transactions are taken into account in the statistical report.

- "Classification link"

In the **Statistical parameters** tab you can specify that the statistical report takes into account a classification different from the default classification specified with the standard of the individual statistic. The tab will show as many classification links as there are included in the individual statistical report. If, for example, you classify the data on statistic of active members according to two characteristics (category

and permanent residence municipality), the links to these two classifications (by category and municipality) will be available.

If you click the **Classification link** button, the **Select classification definition** window will open. You can choose from system defined or user defined classifications. Select the classification you want to use in the statistical report. You can only select the classification by the same characteristic (e.g. in the classification link by member category you can only choose from different classifications by member categories and you cannot choose the classification by gender).

After you click the **OK** button, the link to the selected classification is defined.

You can also specify if the categories in each classification are in descending or in ascending order; if you do not specify this, the categories are classified in no particular order.

The classification selected in the **Statistical parameters** option during report creation is only taken into account when creating the report. The next time you create the report the classification defined in the report will be taken into account by default.

B.3.6 Statistics in the group *Cash register* (from LOAN-STA-CR01 to LOAN-STA-CR09)

When creating the statistical report specify the value of the following parameters:

- "Entered"

Specify the period that should be taken into account in the statistical report for the cash register.

Parameter entry is mandatory.

- "Transaction type"

Select the types of transactions in the cash register that should be taken into account in the statistical report.

Parameter entry is mandatory. The following transactions are set as default: *debts settlement*, *repayment (credit note)* and *debts settlement cancellation*.

- "Payment method"

You can specify that the statistical report of payments takes into account only transactions with selected payment methods.

It only makes sense to specify the parameter value if you are creating a statistical report of payments (for the transactions *debts settlement*, *repayment (credit note)* and *debts settlement cancellation*).

Parameter entry is not mandatory. If you do not specify the parameter value, the cash register transactions without considering the payment method are taken into account.

- "Type of non-cash payment"

You can specify that the statistical report of payments takes into account only transactions with selected types of non-cash payments.

It only makes sense to specify the parameter value if you are creating a statistical report of payments (for transactions *debts settlement*, *repayment (credit note)* and *debts settlement cancellation*) with non-cash types of payment.

Parameter entry is not mandatory. If you do not specify the parameter value, the cash register transactions for all types of payments are taken into account.

- "Type of service/debts"

You can specify that the statistical report of payments takes into account only transactions for selected types of payments/debts.

Parameter entry is not mandatory. If you do not specify the parameter value, the selected cash register transactions for all types of services/debts are taken into account.

- "Reason for deletion/writing off debts"

You can specify that the statistical report takes into account only transactions for specific reasons for deletion/writing off debts.

Parameter entry is not mandatory. If you do not specify the parameter value, transactions of deletion and writing off debts without considering the reason are taken into account.

- "Entered by"

You can specify that the statistical report takes into account only cash register transactions performed with specific usernames.

When entering usernames you can use the expand option.

Parameter entry is not mandatory. If you do not specify the parameter value, the selected transactions are taken into account without considering under which username they were entered.

- "Library department"

From the code list of departments select the departments that should be taken into account in the statistical report.

Parameter entry is not mandatory. If you do not specify the departments, the transactions in all departments are taken into account in the statistical report.

- "Classification link"

In the **Statistical parameters** tab you can specify that the statistical report takes into account a classification different from the default classification specified with the standard of the individual statistic. The

tab will show as many classification links as there are included in the individual statistical report. If, for example, you classify the data on statistic of active members according to two characteristics (category and permanent residence municipality), the links to these two classifications (by category and municipality) will be available.

If you click the **Classification link** button, the **Select classification definition** window will open. You can choose from system defined or user defined classifications. Select the classification you want to use in the statistic creation. You can only select the classification by the same characteristic (e.g. in the classification link by member category you can only choose from different classifications by member categories and you cannot choose the classification by gender).

After you click the **OK** button, the link to the selected classification is defined.

You can also specify if the categories in each classification are in descending or in ascending order; if you do not do this, the categories are classified in no particular order.

The classification selected in the **Statistical parameters** option during report creation is only taken into account when creating the report. The next time you create the report the classification defined in the report will be taken into account by default.

B.4 DESCRIPTION OF INDIVIDUAL STATISTICS

B.4.1 Statistics in the group *Statistics / Loan of material*

B.4.1.1 LOAN-STA-Mt01: By type of material/active months

The report shows the data on the number of selected loan transactions for the selected period.

The data is arranged vertically by the type of material on loan and horizontally by months when the transactions were performed. If there were no transactions performed in one of the months, the column for this month is not shown. This is followed by the summary line and the column for all types of material and shown months.

The criteria for the classification by the type of material are specified with the classification *type of material (loan)* and for the classification by active months with the classification *active_months*.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.2 LOAN-STA-Mt02: By type of material/months

The report shows the data on the number of selected loan transactions for the selected period.

The data is arranged vertically by the type of material on loan, and horizontally for all months. If there were no transactions performed in one of the months, the symbol "-" is displayed. This is followed by the summary line and the column for all types of material and all months.

The criteria for the classification by the type of material are specified with the classification *type of material (loan)* and for the classification by active months with the classification *months_1* (the classification is saved in the folder **Classifications / Standard / General**).

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.3 LOAN-STA-Mt03: By type of material (physical form)/months

The report shows the data on the number of selected loan transactions for the selected period.

The data is arranged vertically by the type of material according to the record type in the subfield *001b - type of record* and horizontally for all months. If there were no transactions performed in one of the months, the symbol "-" is displayed. This is followed by the summary line and the column for all types of material and all months.

The criteria for the classification by the type of material are specified with the classification *physical form_4*, and for the classification by active months with the classification *months_1* (the classification is saved in the folder **Classifications / Standard / General**).

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.4 LOAN-STA-Mt04: By UDC (main)/language/active months

The report shows the data on the number of selected loan transactions for the selected period.

The data is arranged vertically first by the UDC in the subfield *675s – Statistics* (the local code list *UDC for statistics (CODE 85)* is taken into account) and then by language entered in the subfield *101a – language of text*. Horizontally the data is shown by months when the transactions were performed. If there were no transactions performed in one of the months, the column for this month is not shown. This is followed by the summary line and the column for all UDCs, languages by the used classification and months.

The criteria for the classification by UDC are specified with the classification *UDC_1*, and for the classification by active months with the classification *active_months*.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.5 LOAN-STA-Mt05: By UDC (main)/language/months

The report shows the data on the number of selected loan transactions for the selected period.

The data is arranged vertically first by the UDC in the subfield *675s – Statistics* (the local code list *UDC for statistics (CODE 85)* is taken into account) and then by language. Horizontally the data is shown by months when the transactions were performed. If there were no transactions performed in one of

the months, the symbol "-" is displayed. This is followed by the summary line and the column for all UDCs, languages by the used classification and months.

The criteria for the classification by the UDC are specified with the classification *UDC_1* and for the classification by active months with the classification *months_1* (the classification is saved in the folder **Classifications / Standard / General**). By languages the data is classified into domestic language (according to the COBISS system – e.g. in COBISS.SI the domestic language is Slovene) and other languages (all languages that are different from the language set as the domestic language in the individual system).

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.6 LOAN-STA-Mt06: By type of material/member category (school libraries)

The report shows the data on the number of selected loan transactions for the selected period.

The data is arranged vertically by the type of material according to physical form and horizontally by member category. This is followed by the summary line and the column for all types of material and all member categories.

The criteria for the classification by the type of material are specified with the classification *type of material (loan) – code type* and for the classification by member category with the classification *member_category_2*.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.7 LOAN-STA-Mt07: By class/active months

The report shows the data on the number of selected loan transactions for the selected period.

The data is arranged vertically by the class/grade that was entered for the member in the "Class/grade" attribute at the time of entering the transactions included in the report. Horizontally the data is shown by months when the transactions were performed. If there were no transactions performed in one of the months, the column for this month is not shown. This is followed by the summary line and the column for all classes and all months.

The data is classified by departments according to all different classes/grades entered in the selected transactions, and for classifying by active months the data are classified with *active_months*.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.8 LOAN-STA-Mt08: By UDC (detailed)/language/active months

The report shows the data on the number of selected loan transactions for the selected period.

The data is arranged vertically first by the UDC in the subfield *675s – Statistics* (the local code list *UDC for statistics (CODE 85)* is taken into account) and then by language. Horizontally the data is shown by months when the transactions were performed. If there were no transactions performed in one of the months, the column for this month is not shown. This is followed by the summary lines and the column for all UDCs, languages by the used classification and months.

The criteria for the classification by the UDC are specified with the classification *UDC 675s_3 (dynamic)* and for the classification by active months with the classification *active_months*. By languages the data is classified into domestic language (according to the COBISS system – e.g. in COBISS.SI the domestic language is Slovene) and other languages (all languages that are different from the language set as the domestic language in the individual system).

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.9 LOAN-STA-Mt09: By UDC (detailed)/intended purpose/language/active months

The report shows the data on the number of selected loan transactions for the selected period.

The data is arranged vertically first by the UDC in the subfield *675s – Statistics* (the local code list *UDC for statistics (CODE 85)* is taken into account), then by intended purpose and after that by language. Horizontally the data is shown by months when the transactions were performed. If there were no transactions performed in one of the months, the column for this month is not shown. This is followed by the summary lines and the column *total*.

The criteria for the classification by the UDC are specified with the classification *UDC_1*, for the classification by intended purpose with the classification *intended purpose_1 (adults/children)*, for the classification by language with the classification *language_2 (dynamic)*, and for the classification by months with the classification *active_months*.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.10 LOAN-STA-Mt10: By material ratio/member category

The report shows the data on the number of selected loan transactions for the selected period.

The data on transactions is divided vertically by the UDC in the subfield 675s – *Statistics* into fiction and non-fiction and horizontally by member category into age groups youth, adults and others. This is followed by the column and the line with summary data.

The criteria for the classification by the UDC are specified with the classification *UDC_4_string* (*ratio non-fict.-fict.*), and by age groups with the classification *member category_4* (*youth/adults/other*).

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.11 LOAN-STA-Mt11: By mobile library stops/member category/active months

The report shows the data on the number of selected loan transactions for the selected period. It is intended for libraries with a mobile library department.

The data on transactions is arranged vertically according to mobile library stops and then by member category into age groups of young, adults and others. Horizontally the data is shown by months when the transactions were performed. If there were no transactions performed in one of the months, the column for this month is not shown. This is followed by the lines and column with summary data.

The data are classified by mobile library stops where the selected transactions were performed. The data is classified by age groups based on the classification *member category_4* (*youth/adults/other*) and by months based on the classification *active_months*.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.1.12 LOAN-STA-Mt12: By financier/material/member category

The report shows the data on the number of selected loan transactions for the selected period.

The data on transactions is divided vertically by financiers and then by the UDC in the subfield 675s – *Statistics* into fiction and non-fiction. Horizontally, the data is shown by member age group (according to the member category). This is followed by the lines and the column with summary data.

By financiers the data is classified by all various material financiers entered in the subfield 99X 4 – *financier*. The criteria for classification by UDC are

specified with the classification *UDC_4_string* (*ratio non-fict.-fict.*) and by age groups with the classification *member category_4* (*youth/adults/other*).

B.4.2 Statistics in the group Statistics / Transactions

B.4.2.1 LOAN-STA-T01: By member category/months

The report shows the data on the number of selected loan transactions for the selected period.

The data on transactions is arranged vertically by member category and horizontally by months. This is followed by the line and the column with summary data.

For display by member category, the classification *member_category_7* (*dynamic*) is used; for display by months, the classification *active_months* is used.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.2.2 LOAN-STA-T02: By member category/days

The report shows the data on the number of selected loan transactions for the selected period.

The data on transactions are shown vertically by member categories and horizontally by individual days (dates) of the selected period. This is followed by the line and the column with summary data.

For display by member category, the classification *member_category_7* (*dynamic*) is used. By days, the data is shown with dates, for all dates when the selected transactions were entered in the selected period.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.2.3 LOAN-STA-T03: By municipality/member category

The report shows the data on the number of selected loan transactions for the selected period.

The data on transactions is shown vertically by the permanent residence municipality and horizontally by member categories. This is followed by the line and the column with summary data.

For display by member category, the classification *member_category_7* (*dynamic*) is used, for display by municipality, the classification *municipality_1* (*dynamic*) is used.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.3 Statistics in the group Statistics / Calculation of no. of visits

B.4.3.1 LOAN-STA-VT01: LOAN-STA-VT01: By member category/months (transactions)

The report shows the data on the number of visits for the selected period. The transactions that you wish to be taken into account when calculating the number of visits are defined on the **Parameters** tab.

The data is vertically shown by member categories and horizontally by months. This is followed by the line and the column with summary data. If there were no member visits entered in one of the months, the column for this month is not shown.

By categories the data is classified by the classification *member_category_7* (*dynamic*) and for display by months the classification *active_months* is used.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.3.2 LOAN-STA-VT02: By member category/days (transactions)

The report shows the data on the number of visits for the selected period.

The data is vertically shown by member categories and horizontally by individual days (dates) of the selected period. This is followed by the line and the column with summary data. If there were no member visits entered on one of the days, the column for this date is not shown.

By categories the data is classified according to the classification *member_category_7* (*dynamic*). By days, the data is shown as dates for all dates when a member visit was recorded.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.3.3 LOAN-STA-VT03: By class/months (transactions)

The report shows the data on the number of visits for the selected period.

The data is shown vertically by the class/grade entered for the member in the "Class/grade" attribute and horizontally by months when the visits were recorded. If there were no visits in one of the months, the column for this month is not shown. The summary data is shown in the line *all* and in the column *total*.

By departments, the data is classified based on the classification *Class/grade (dynamic)*; for the display by months the classification *active_months* was used.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.3.4 LOAN-STA-VT04: By class/days (transactions)

The report shows the data on the number of visits for the selected period.

The data is classified vertically based on the classification *Class/grade (dynamic)*. By days the data is shown by date for all dates when the selected transactions were recorded in the selected period. This is followed by the line and the column with summary data.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.3.5 LOAN-STA-VT05: By municipality/member category (transactions)

The report shows the data on the number of visits in the selected period.

The data on transactions is vertically shown by permanent residence municipality and horizontally by member categories. This is followed by the line and the column with summary data.

By municipalities, the data is classified according to the classification *municipality_1 (dynamic)* and the classification *member category_7 (dynamic)* is used for the display by categories.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.3.6 LOAN-STA-VT06: By mobile library stops/member category (transactions)

The report shows the data on the number of visits in the selected period.

The data on transactions is vertically shown by stops and horizontally by member categories. This is followed by the line and the column with summary data.

The data on the mobile library stops are displayed based on the classification *mobile library stop_2* (dynamic); the classification *member category_7* (dynamic) is used for the display by categories.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.3.7 LOAN-STA-VT07: By hours/days (transactions)

The report shows the data on the number of visits in the selected period.

The data on transactions is shown vertically by hours and horizontally by days of the selected period. This is followed by the line and the column with summary data.

By hours, the data is classified according to the classification *by hours_1* (dynamic). By days, the data is shown by date for all dates when a visit was recorded.

If you select a period of multiple years when creating the statistical report, the data for individual years is shown in separate tables.

B.4.4 Statistics in the group Statistics / Active members

The rules for calculating the number of visits are described in the document *Calculation of number of visits and active members* that is published on the Training portal along with the COBISS3/Loan software manual.

B.4.4.1 LOAN-STA-A01: By member category (school libraries)

The report shows the data on the number of active members for the selected activities in the selected period.

The data is shown vertically by member categories. The summary data is shown in the line and the column *total*.

The classification *member category_3* is used for display by categories where the data on members is classified into groups *pupils or students*, *students* and *other*.

B.4.4.2 LOAN-STA-A02: By member category

The report shows the data on the number of active members for the selected activities in the selected period.

The data is shown vertically by the classification *member category_9*. The summary data is shown in the line and the column *total*.

B.4.4.3 LOAN-STA-A03: By municipality/member category

The report shows the data on the number of active members for the selected activities in the selected period.

The data is shown vertically by permanent residence municipalities and horizontally by member categories.

In the statistical report, the data is shown vertically only for the municipalities (classification *municipality_3 (dynamic; without other)*), and horizontally for the member categories (classification *member category_8 (dynamic)*) that had entered visits. This is followed by the line and the column with summary data.

B.4.4.4 LOAN-STA-A04: By mobile library stops/member category

The report shows the data on the number of active members for the selected activities in the selected period.

The data is shown vertically by mobile library stops and horizontally by member categories. This is followed by the line and the column with summary data.

In the statistical report, the data is shown vertically only for the stops where a member visit was entered. The data by member categories is shown by classification *member category_8 (dynamic)*.

B.4.5 Statistics in the group Statistics (user classifications) / Members

B.4.5.1 LOAN-STA-Mb01: By member category and LOAN-STA-Mb31: By member category (members database)

The report shows the data on the number of active members for the selected activities in the selected period.

The data is shown for all member categories (classification *member category_5* (static; all categories)). If there are no active members in an individual category, this category shows a hyphen ("-"). The summary data is shown in the line *total*.

For the statistical report LOAN-STA-Mb01, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb31, the data is taken from the members database.

B.4.5.2 LOAN-STA-Mb02: By member category/gender and LOAN-STA-Mb32: By member category/gender (members database)

The report shows the data on the number of active members for the selected activities in the selected period.

The data is shown vertically for all member categories (classification *member category_5* (static; all categories)) and in the columns by gender (classification *gender_1* (static)). If there are no active members in an individual category for an individual gender, this category shows a hyphen ("-"). The summary data is shown in the line and in the column *total*.

For the statistical report LOAN-STA-Mb02, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb32, the data is taken from the members database.

B.4.5.3 LOAN-STA-Mb03: By municipalities/member category and LOAN-STA-Mb33: By municipalities/member category (members database)

The report shows data on the number of active members.

The data is shown vertically for all permanent residence municipalities (classification *municipality_5* (static; all municipalities)) and in the columns for all member categories (classification *member category_2* (static; all categories)). If there are no active members in an individual municipality for an individual category, a hyphen ("-") is displayed. The summary data is shown in the line and in the column *total*.

For classification by municipality for this statistical report it makes sense to create a user classification definition where you only include the municipalities that are relevant to the area of library operations.

For the statistical report LOAN-STA-Mb03, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb33, the data is taken from the members database.

B.4.5.4 LOAN-STA-Mb04: By mobile library stop (at the member)/member category and LOAN-STA-Mb34: By mobile library stop (at the member)/member category (members database)

The report is intended for libraries with a mobile library. It shows the data on the number of active members.

The data is shown vertically for all mobile library stops (classification *mobile library stop_1 (static)*) and in the columns for all member categories (classification *member category_5 (static; all categories)*). If there were no active members at the stop for a category, a hyphen ("-") is shown. The summary data is shown in the line and in the column *total*.

For classifying by stops you need to create a user classification definition, where you include the stops of your library.

For the statistical report LOAN-STA-Mb04, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb34, the data is taken from the members database.

B.4.5.5 LOAN-STA-Mb05: By department/member category and LOAN-STA-Mb35: By department/member category (members database)

The report shows the data on the number of active members.

The data is shown vertically by library departments (classification *department_2 (dynamic)*) and in columns by member categories (classification *member category_7 (dynamic)*). The data is shown only for the departments and member categories in which the members were active. The summary data is shown in the line and in the column *total*.

For the statistical report LOAN-STA-Mb05, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb35, the data is taken from the members database.

B.4.5.6 LOAN-STA-Mb06: By department/member category/age and LOAN-STA-Mb36: By department/member category/age (members database)

The report shows the data on the number of active members.

The data is shown vertically by library departments (classification *department_2 (dynamic)*) and then by member categories (classification *member category_7 (dynamic)*). The data is shown horizontally by age groups based on member age (classification *member age_1 (static; children/adults according to the year of birth)*).

The data is only shown for the departments and member categories in which the members were active. The summary data is shown in the line and in the column *total*.

For the statistical report LOAN-STA-Mb06, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb36, the data is taken from the members database.

B.4.5.7 LOAN-STA-Mb07: By department/member category/months and LOAN-STA-Mb37: By department/member category/months (members database)

The report shows the data on the number of active members.

The data is shown vertically by library department (classification *department_2 (dynamic)*) and then by member category (classification *member category_7 (dynamic)*). The data is shown horizontally by months (classification *month_1 (static; all months)*).

The data is only shown for the departments and the member categories in which the members were active. The summary data is shown in the line and in the column *total*.

For the statistical report LOAN-STA-Mb07, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb37, the data is taken from the members database.

B.4.5.8 LOAN-STA-Mb08: By department/gender/age

The report shows the data on the number of active members.

The data is shown vertically for all library departments (classification *department_1 (static)*) and then by gender (classification *gender_1 (static)*). The data is shown horizontally by age groups based on member category (classification *member age_1 (static; children/adults according to the year of*

birth)). If there were no active members in the department for an individual gender and age group, a hyphen ("-") is shown.

The summary data is shown in the line and in the column *total*.

To classify by departments a user definition of the classification *department_1 (static)* where you include the departments of your library needs to be created.

B.4.5.9 LOAN-STA-Mb09: By department/gender/member category and LOAN-STA-Mb39: By department/gender/member category (members database)

The report shows the data on the number of active members.

The data is shown vertically for library departments (classification *department_2 (dynamic)*) where the members were active and then by gender (classification *gender_1 (static)*). Horizontally the data is shown for the categories with active members (classification *member category_7 (dynamic)*).

Summary data is shown in the line and in the column *total*.

For the statistical report LOAN-STA-Mb09, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb39, the data is taken from the members database.

B.4.5.10 LOAN-STA-Mb10: by department/municipality/member category and LOAN-STA-Mb40: by department/municipality/member category (members database)

The report shows the data on the number of active members.

The data is shown vertically by library department (classification *department_2 (dynamic)*) and permanent residence municipality of the member (classification *municipality_1 (dynamic)*). The data is shown horizontally by member category (classification *member category_7 (dynamic)*). The data is shown only for the departments, municipalities, and categories with active members.

The summary data is shown in the line and in the column *total*.

For the statistical report LOAN-STA-Mb10, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb40, the data is taken from the members database.

B.4.5.11 LOAN-STA-Mb11: LOAN-STA-Mb11: By municipality of mobile library stop/mobile library stop (at the member)/member category and LOAN-STA-Mb41: By municipality of mobile library stop/mobile library stop/member category (members database)

The report shows the data on the number of active members. It is intended for libraries that also have a mobile library.

The data is shown vertically by municipality of mobile library stop (classification *municipality of mobile library stop_2 (dynamic)*) and the mobile library stop that is entered for the member (classification *municipality of mobile library stop_2 (dynamic)*). The data is shown horizontally by member category (classification *member category_5 (static; all categories)*). The data is only shown for mobile library stops with active members.

Summary data is shown in the line and in the column *total*.

For the statistical report LOAN-STA-Mb11, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb41, the data is taken from the members database.

B.4.5.12 LOAN-STA-Mb12: By university/member category/university in eVŠ and I LOAN-STA-Mb42: By university/member category/university in eVŠ (members database)

The report shows the data on the number of active members.

The data is shown vertically by university (classification *university (dynamic)*), then by member category (classification *member category_8 (dynamic)*) and then by university in eVŠ (classification *university in eVŠ (dynamic)*).

Summary data is shown in the line and in the column *total*.

For the statistical report LOAN-STA-Mb12, the data is taken from the loan transaction files; for the statistical report LOAN-STA-Mb42, the data is taken from the members database.

B.4.6 Statistics in the group Statistics (user classifications) / Calculation of no. of visits

B.4.6.1 LOAN-STA-V10: By hour/day of the week

The report shows the data on the number of visits in the selected period.

The data is shown vertically by hours of the day (classification *by hours_2 (static)*) and horizontally for all days of the week (classification *day of the week_1 (static; all days)*). If there were no entered visits in an individual hour in the day of the week, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.6.2 LOAN-STA-V11: By days of the month/hours

The report shows the data on the number of visits in the selected period.

The data is shown vertically by days of the month (classification *day of month_1 (static; all days)*) and horizontally for all hours in the day (classification *by hours_2 (static)*). If there were no entered visits in an individual hour in the day of the week, a hyphen ("-") is displayed.

The summary data is shown in the line and the column *total*.

B.4.6.3 LOAN-STA-V12: By member category/month

The report shows the data on the number of visits in the selected period.

The data is shown vertically by member category combined into groups youth, adults and others (classification *member category_6 (static; youth/adults/others)*) and horizontally by all months (classification *by months_1 (static)*). If there were no entered visits for an individual group in one of the months, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.6.4 LOAN-STA-V13: By department/member category/month

The report shows the data on the number of visits in the selected period.

The data is shown vertically by departments (classification *department_1 (static)*) and then by member category (classification *member category_5 (static; all categories)*). Horizontally the data is shown by all months (classification *by months_1 (static)*). If there were no entered visits in an individual department and member category in one of the months, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

To classify by departments a user definition of the classification *department_1 (static)* needs to be created for this statistic where you include the departments of your library.

B.4.6.5 LOAN-STA-V14: By department/month/gender/age

The report shows the data on the number of visits in the selected period.

The data is shown vertically by department (classification *department_1 (static)*), then by month (classification *month_1 (static; all months)*) and after that also by gender (classification *gender_1 (static)*). Horizontally the data is shown by age groups of the members (classification *member age_1 (static; children/adults according to the year of birth)*). If there were no entered visits for an individual department, month, gender or age group, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.6.6 LOAN-STA-V15: By department/month/municipality/member category

The report shows the data on the number of visits in the selected period.

The data is shown vertically by department (classification *department_2 (dynamic)*), then by month (classification *month_1 (static; all months)*) and after that also by the permanent residence municipality (classification *municipality_1 (static)*). Horizontally the data is shown by age groups of the members (classification *member category_5_1 (static; all categories)*). The data is only shown for the departments where a visit was entered. If there were no entered visits in a certain month, municipality or member category for a department with visits, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

To classify by departments a user definition of the classification *municipality_1 (static)* needs to be created for this statistic where you include the municipalities that are current in the area of library operation.

B.4.6.7 LOAN-STA-V16: By department/month/member category

The report shows the data on the number of visits in the selected period.

The data is shown vertically by department (classification *department_1 (static)*) and then by all months (classification *by months_1 (static)*). Horizontally the data is shown by member category (classification *member category_5 (static; all categories)*). If there were no entered visits in an individual department or month in any of the categories, a hyphen ("-") is displayed.

The summary data is shown in the line and the column *total*.

To classify by departments a user definition of the classification *department_1 (static)* needs to be created for this statistic where you include the departments of your library.

B.4.6.8 LOAN-STA-V17: By department/hour/member category

The report shows the data on the number of visits in the selected period.

The data is shown vertically by department (classification *department_1 (static)*) and then by all hours (classification *by hours_2 (static)*). Horizontally the data is shown by member category (classification *member category_5 (static; all categories)*). If there were no entered visits in an individual department or hour in any of the categories, a hyphen ("-") is displayed.

The summary data is shown in the line and the column *total*.

To classify by departments a user definition of the classification *department_1 (static)* needs to be created for this statistic where you include the departments of your library.

B.4.6.9 LOAN-STA-V18: By department/hour/day of the month

The report shows the data on the number of visits in the selected period.

The data is shown vertically by department (classification *department_1 (static)*) and then by hour (classification *by hours_2 (static)*). The data is shown horizontally by all days of the month (classification *day of month_1 (static; all days)*). If there are no entered visits in an individual department or hour in any of the days of the month, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

To classify by departments a user definition of the classification *department_1 (static)* needs to be created for this statistic where you include the departments of your library.

B.4.6.10 LOAN-STA-V19: By department/month/department of registration

The report shows the data on the number of visits in the selected period.

The data is shown vertically by library departments (classification *department_1 (static)*) and then by individual months (classification *months_1 (static; all months)*). The data is shown horizontally by library departments (classification *department_1 (static)*). If there were no entered visits in an individual department or month for the members in any of the registration departments, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

To classify by departments a user definition of the classification *department_1 (static)* needs to be created for this statistic where you include the departments of your library.

B.4.6.11 LOAN-STA-V20: By stop/member category/month

The report shows the data on the number of visits in the selected period.

The data is shown vertically by mobile library stops (classification *mobile library stop_1 (static)*) and then by member groups youth, adults and others (classification *member category_6 (static; youth/adults/others)*). The data is shown horizontally by all months (classification *by months_1 (static)*). If there were no entered visits for an individual stop or member category in any of the months, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

To classify by mobile library stops a user definition of the classification *mobile library stop_1 (static)* needs to be created for this statistic where you define the stops of your library.

B.4.7 Statistics in the group Statistics (user classifications) / Transactions

B.4.7.1 LOAN-STA-T10: By intended purpose

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is classified by intended purpose of the material into the category *O* (printed materials for adults), category *M* (printed materials for youth) and the category *other* (classification *intended purpose_2 (static; children/adults in respect to 100e)*). If there were no entered transactions for an individual intended purpose, a hyphen ("-") is displayed.

The summary data is shown in the line *total*.

B.4.7.2 LOAN-STA-T11: By intended purpose/language/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by intended purpose of the material according to the categories *O* (printed materials for adults), *M* (printed materials for youth) and *other* (*classification intended purpose_2 (static; children/adults in respect to 100e)*) and then by languages to Slovene and other languages (*classification language_4 (static; slv/others)*). The columns show the data on the number of transactions by UDC in the subfield 675s – *Statistics* (*classification UDC 675s_2 (static)*). If there are no entered transactions for an individual group of intended purposes, language and UDC, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.3 LOAN-STA-T12: By intended purpose/physical form (record type)/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is vertically shown by intended purpose of the material according to the categories *O* (printed materials for adults), *M* (printed materials for youth) and *other* (*classification intended purpose_2 (static; children/adults in respect to 100e)*) and then by physical form according to the record type entered in the subfield 001b - *type of record* (*classification physical form_1 (static; book/non-book/other in respect to the record type)*). The columns show the data on the number of transactions by UDC in the subfield 675s – *Statistics* (*classification UDK 675s_1 (static)*). If there were no entered transactions for an individual group of intended purposes, physical form and UDC, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.4 LOAN-STA-T13: By 675s/intended purpose

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by UDC groups according to the subfield 675s – *Statistics* (*classification UDC 675s_2 (static)*). In the columns, the data is shown by material intended purpose for the categories *O* (printed materials for adults), *M* (printed materials for youth) and *other* (*classification intended purpose_2 (static; children/adults in respect to 100e)*). If there were no entered transactions for an individual UDC group and intended purpose group, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.5 LOAN-STA-T14: By municipality

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by permanent residence municipality (classification *municipality_2 (static; all municipalities)*). If there were no entered transactions for an individual municipality, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by municipality for this statistical report it makes sense to create a user classification definition where you only include the municipalities that are relevant to the area of library operations.

B.4.7.6 LOAN-STA-T15: By municipality/member category

The report shows the data on the number of selected loan transactions in the selected period.

The number of transactions is shown vertically by permanent residence municipalities (classification *municipality_2 (static; all municipalities)*) and in the columns for individual member categories (classification *member category_5 (static; all categories)*).

If there were no entered transactions for an individual municipality for any of the member categories, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by municipality for this statistical report it makes sense to create a user classification definition where you only include the municipalities that are relevant to the area of library operations.

B.4.7.7 LOAN-STA-T16: By shelving UDC/physical form (record type) – AV collection

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by shelving UDC (classification *UDC open access (d\u)_1 (static)*) and in the columns the data is classified according to the physical form of the material and according to the record type in the contents of the subfield *001b - type of record* into *videorecordings*, *sound recordings* and *electronic resources* (classification *physical form_2 (static; g/i/j/l in respect to the record type)*). The data for other material is shown in the columns *other* and *empty value*.

If there were no entered transactions for any of the UDC groups and individual material forms, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.8 LOAN-STA-T17: By shelving UDC/physical form (material type) – music CDs

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by shelving UDC (classification *UDC open access (d\u)_1 (static)*) and in the columns the data is classified by the physical form of the material according to the material on loan into *sound recordings – CD (music)*, *sound recordings – cassettes (music)*, *sound recordings – DVD (music)* and *sound recordings – other* (classification *physical form_5 (static; sound recordings in respect to the material type)*). The data for other material is shown in the columns *other* and *empty value*.

If there were no entered transactions for any of the UDC groups and individual types of material, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.9 LOAN-STA-T18: By shelving location/year of accessioning

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by shelving locations (classification *shelving location_2 (static)*) in the categories *cd*, *cdr* and *dvd*. The data for material with other shelving locations is shown in the lines *other* and *empty value*. In the columns, the data is shown by years of accessioning of the copies (classification *year of accessioning_1 (dynamic)*).

If there were no entered transactions for material with individual shelving location and year of accessioning, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by shelving locations a user classification definition needs to be created for this statistic where you include the shelving locations used in your library.

B.4.7.10 LOAN-STA-T19: By physical form (record type)/intended purpose/shelving UDC (C,P,M,L)/675s

The report shows the data on the number of selected transactions in the selected period.

The number of transactions is classified vertically by physical form of the material according to the contents of the subfield *001b - type of record* (classification *physical form_1 (static; book/no-book/other in respect to the record type)*) into *book material*, *non-book material* and *other*, then by intended purpose for the groups *O* (printed materials for adults) and *M* (printed materials for youth) (classification *intended purpose_2 (static; children/adults in respect to 100e)*) and then according to the shelving UDC into groups *C*, *P*, *M* and *L* (classification *UDC open access (d\u)_2 (static; C/P/M/L)*). In the columns, the data is shown by UDC groups according to the contents of the subfield *675s - Statistics* (classification *UDC 675s_1 (static)*).

If there were no entered transactions for individual material according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.11 LOAN-STA-T20: By physical form (material type)/intended purpose

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by physical form of the material according to the type of material on loan (classification *physical form_6 (static; all types of material)*). The data is shown horizontally by intended purpose of the material in the groups *O* (printed materials for adults) and *M* (printed materials for youth) (classification *intended purpose_2 (static; children/adults in respect to 100e)*).

If there were no entered transactions for an individual type of material and intended purpose, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.12 LOAN-STA-T21: By financier/675s/member category

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by financier (classification *financier_1 (static)*) and then by UDC (classification *UDC 675s_1 (static)*). Horizontally the data is shown by member categories *youth*, *adults*, *other* and *empty value* (classification *member category_6 (static; youth/adults/others)*).

If there are no entered transactions for an individual material type by financiers and intended purpose, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by financiers a user classification definition needs to be created for this statistic where you include the financiers relevant to your library.

B.4.7.13 LOAN-STA-T22: By acquisition type/sublocation/shelving UDC/year of accessioning

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by acquisition type (classification *acquisition type_1 (static; all types)*), then by sublocation of the material (classification *sublocation_1 (static)*), and then by shelving UDC (classification *UDC open access (d\u)_1 (static)*). In the columns, the data is shown by year of accessioning of the copies (classification *year of accessioning_1 (dynamic)*).

If there are no entered transactions for an individual group of material according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by sublocations a user classification definition needs to be created for this statistic where you include the sublocations used in your library.

B.4.7.14 LOAN-STA-T23: By acquisition type/675s/sublocation/year of accessioning

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by acquisition type (classification *acquisition type_1 (static; all types)*), then by UDC according to the contents of the subfield 675s – *Statistics* (classification *UDC 675s_1 (static)*), and then by sublocation of the material (classification *sublocation_1 (static)*). In the columns, the data is shown by years of accessioning of the copies (classification *year of accessioning_1 (dynamic)*).

If there were no entered transactions for an individual group of material according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by sublocations a user classification definition needs to be created for this statistic where you include the sublocations used in your library.

B.4.7.15 LOAN-STA-T24: By username/hour/day of the month

The report shows the data in the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by username that was used to enter the transaction (classification *user_1 (static)*) and then by hour of the day (classification *by hours_2 (static)*). In the columns, the data is shown by individual days of the month (classification *day of month_1 (static; all days)*).

If there are no entered transactions for a user name in an individual hour or day of the month, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by usernames a user classification definition needs to be created for this statistic where you include the usernames of the employees in your library.

B.4.7.16 LOAN-STA-T25: By department/transaction type

The report shows the data on the number of loan transactions for the selected period.

The number of transactions is shown vertically by individual library departments (classification *department_1 (static)*), and horizontally by transactions (classification *transaction type_1 (static)*).

If there were no entered transactions in an individual department for any of the transaction types, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments and transactions user definitions of both classifications need to be created for this statistic. Include the departments of your library and the transaction types that you are interested in in the classifications. When creating the classification for transactions you can use the transactions code list that opens for the parameter "Transaction" when creating this statistical report. A system definition of the classifications *transaction type_3 (static; all types of transactions)* that includes all types of transactions is also created. If you are interested in the data for all types of transactions use this classification when creating the statistical report.

B.4.7.17 LOAN-STA-T26: By department/shelving UDC/physical form (record type) – AV collection

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by individual library departments (classification *department_1 (static)*), then by shelving UDC (classification *UDC open access (du)_1 (static)*), and horizontally by physical form of the material for the groups *videorecordings*, *sound recordings*, *electronic resources* and *other* (classification *physical form_2 (static; g/i/j/l in respect to the record type)*).

If there were no entered transactions in an individual department for an individual group of material, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments and shelving UDC user definitions of both classifications need to be created for this statistic. You include the departments and shelving UDCs of your library.

B.4.7.18 LOAN-STA-T27: By department/675s/month

The report shows the data in the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by individual library departments (classification *department_1 (static)*), then by UDC groups according to the contents of the subfield *675s – Statistics* (classification *UDC 675s_1 (static)*), and horizontally by individual months (classification *months_1 (static; all months)*).

If there were no entered transactions for an individual group of material in any of the months, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.19 LOAN-STA-T28: By department/675s/intended purpose

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by individual library departments (classification *department_1 (static)*), then by UDC groups according to the contents of the subfield *675s – Statistics* (classification *UDC 675s_1 (static)*), and in the columns by the intended purpose of the material for the groups *adults* and *children* (classification *intended purpose_1 (adults/children)*).

If there are no entered transactions in an individual department for the individual group of material, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.20 LOAN-STA-T29: By department/intended purpose

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by individual library departments (classification *department_1* (static)), and in the columns by the intended purpose of the material for the groups *O* (printed materials for adults), *M* (printed materials for youth), *other* and *empty value* (classification *intended purpose_2* (static; children/adults in respect to 100e)).

If there were no entered transactions in an individual department for an individual intended purpose of the material, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.21 LOAN-STA-T30: By department/intended purpose/age/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by individual library departments (classification *department_1* (static)), then by intended purpose of the material for the groups *O* (printed materials for adults), *M* (printed materials for youth), *other* and *empty value* (classification *intended purpose_2* (static ;children/adults in respect to 100e)), and then by age groups according to the year of birth of the members into groups *youth*, *adults* and *empty value* (*member age_1* (static; children/adults according to the year of birth)). In the columns the data is shown by UDC groups according to the contents of the subfield 675s – *Statistics* (classification *UDC 675s_1* (static)).

If there were no entered transactions in an individual department according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library. You also need to check the correctness of the classification *member age_1* (static; children/adults according to the year of birth) and create a user definition of this classification if the system classification is not appropriate. The content of the classification for classifying by age group according to the year of birth needs to be updated every year.

B.4.7.22 LOAN-STA-T31: By department/intended purpose/hour/day of the month

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by individual library departments (classification *department_1 (static)*), then by intended purpose of the material for the groups *O* (printed materials for adults), *M* (printed materials for youth), *other* and *empty value* (classification *intended purpose_2 (static; children/adults in respect to 100e)*), and then by all hours of the day (classification *by hours_2 (static)*). In the columns, the data is shown by individual days of the month (classification *day of month_1 (static; all days)*).

If there were no entered transactions in an individual department according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.23 LOAN-STA-T32: By department/language/member category/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by individual library departments (classification *department_1 (static)*), then the data is classified by the language of the material according to the contents of the subfield *101a – Language of the text* into Slovene and other languages (classification *language_4 (static; slv/others)*), and then by all member categories (classification *member category_5 (static; all categories)*). In the columns, the data is shown by UDC groups according to the contents of the subfield *675s – Statistics* (classification *UDC 675s_1 (static)*).

If there are no entered transactions in an individual department according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.24 LOAN-STA-T33: By department/month

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by individual library departments (classification *department_1 (static)*), and horizontally by all months (classification *months_1 (static; all months)*).

If there were no entered transactions in an individual department in any of the months, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.25 LOAN-STA-T34: By department/month/hour/day of the week

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically for individual library departments (classification *department_1 (static)*) by all months (classification *months_1 (static; all months)*), and then by all hours of the day (classification *by hours_2 (static)*). In the columns, the data is shown by individual days of the week (classification *day of the week_1 (static; all days)*).

If there were no entered transactions in an individual department in any of the months, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.26 LOAN-STA-T35: By department/physical form (record type)/month

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically for individual library departments (classification *department_1 (static)*) by physical form of the material according to the contents of the subfield *001b - type of record* (classification *physical form_4 (dynamic; in respect to the record type)*). In the columns, the data is shown by individual months (classification *months_1 (static; all months)*).

If there were no entered transactions in an individual department in any of the months, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.27 LOAN-STA-T36: By department/physical form (record type)/sublocation

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically for individual library departments (classification *department_2 (dynamic)*) by physical form of the material according to the contents of the subfield *001b - type of record* (classification *physical_form_1 (static; book/non-book/other according to the record type)*). In the columns, the data is shown for the sublocations with entered transactions (classification *sublocation_2 (dynamic)*).

If there were no entered transactions in an individual department for any of the material types, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.28 LOAN-STA-T37: By department/physical form (record type)/language/intended purpose

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by individual library departments (classification *department_1 (static)*), by physical form of the material for *book material* and *non-book material* according to the contents of the subfield *001b - type of record* (classification *physical_form_1 (static; book/non-book/other in respect to the record type)*) and by language for *slv* and *others* (classification *language_4 (static; slv/other)*). In the columns, the data is shown by intended purpose for the category *O* (printed materials for adults) and *M* (printed materials for youth) (classification *intended_purpose_2 (static; children/adults in respect to 100e)*).

If there were no entered transactions in an individual department according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.29 LOAN-STA-T38: By department/physical form (record type)/intended purpose/member category

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by individual library departments (classification *department_1 (static)*) by physical form of the material for *book material* and *non-book material* according to the contents of the subfield *001b - type of record* (classification *physical form_1 (static; book/non-book/other in respect to the record type)*) and by intended purpose for *adults* and *children* (classification *intended purpose_1 (adults/children)*). In the columns, the data is shown for all member categories (classification *member category_5 (static; all categories)*).

If there were no entered transactions in an individual department according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.30 LOAN-STA-T39: By department/physical form (record type)/intended purpose/month

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by individual library departments (classification *department_1 (static)*) by physical form of the material for *book material* and *non-book material* according to the contents of the subfield *001b - type of record* (classification *physical form_1 (static; book/non-book/other in respect to the record type)*) and by intended purpose for *adults* and *children* (classification *intended purpose_1 (adults/children)*). In the columns, the data is shown by all months (classification *months_1 (static; all months)*).

If there were no entered transactions in an individual department according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.31 LOAN-STA-T40: By department/physical form (record type)/member category

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically for individual library departments (classification *department_1 (static)*) by physical form of material according to the contents of the subfield *001b - type of record* (classification *physical form_4 (dynamic; in respect to the record type)*). In the columns, the data is shown for all member categories (classification *member category_5 (static; all categories)*).

If there are no entered transactions in an individual department according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.32 LOAN-STA-T41: By department/username/transaction type

The report shows the data on the number of selected loan transactions in the selected period.

The number of loan transactions is shown vertically by library departments where the transactions were entered (classification *department_2 (dynamic)*) by usernames (classification *user_1 (static)*). In the columns the data is shown for individual types of transactions (classification *transaction type_2 (dynamic)*).

If there were no entered transactions in an individual department for an individual username and selected transaction type, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by usernames a user classification definition needs to be created for this statistic where you include the usernames of the employees in your library.

B.4.7.33 LOAN-STA-T42: By department/transaction type/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by library departments where the transactions were entered (classification *department_2 (dynamic)*) by individual transaction types (classification *transaction type_1 (static)*). In the

columns, the data is shown by UDC groups according to the contents of the subfield *675s – Statistics* (classification *UDC 675s_1 (static)*).

If there are no entered transactions in any of the departments for an individual type of transaction and UDC group, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by transactions it makes sense to create a user classification definition for this statistical report where you include the transactions you are especially interested in.

B.4.7.34 LOAN-STA-T43: By department/transaction type/hour/day of the month

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by library departments where the transactions were entered (classification *department_2 (dynamic)*) by individual transaction types (classification *transaction type_2 (dynamic)*) and hours of the day (classification *by hours_2 (static)*). In the columns, the data is shown by all days of the month (classification *day of month_1 (static; all days)*).

If there are no entered transactions in any of the departments for an individual transaction type, hour of the day and day of the month, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.35 LOAN-STA-T50: By intended purpose/languages (domestic/foreign)/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically according to the intended purpose of the material by categories *O* (printed materials for adults), *M* (printed materials for youth) and *other* (classification *intended purpose_2 (static; children/adults in respect to 100e)*), then by languages for *domestic* (according to the language set as the domestic language for the individual library) and *foreign language* (classification *language_3 (static; domestic/foreign)*). In the columns, the data is shown by UDC in the subfield *675s – Statistics* (classification *UDC 675s_2 (static)*).

If there were no entered transactions for an individual group of intended purposes, languages and UDC, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.36 LOAN-STA-T51: By department/language (domestic/foreign)/member category/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically first by individual library departments (classification *department_1* (static)) by languages for *domestic* (according to the language set as the domestic language for the individual library) and *foreign language* (classification *language_3* (static; *domestic/foreign*)), and then by all member categories (classification *member category_5* (static; *all categories*)). In the columns, the data is shown by UDC groups according to the contents of the subfield *675s – Statistics* (classification *UDC 675s_1* (static)).

If there were no entered transactions in an individual department according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.37 LOAN-STA-T52: By department/physical form (record type)/language (domestic/foreign)/intended purpose

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically for individual library departments (classification *department_1* (static)), by physical form of the material according to the contents of the subfield *001b - type of record* for *book material* and *non-book material* (classification *physical form_1* (static; *book/non-book/other in respect to the record type*)) and by languages for *domestic* (according to the language set as the domestic language for the individual library) and *foreign language* (classification *language_3* (static; *domestic/foreign*)). In the columns, the data is shown by intended purpose for the categories *O* (printed materials for adults) and *M* (printed materials for youth) (classification *intended purpose_2* (static; *children/adults in respect to 100e*)).

If there were no entered transactions in an individual department according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.7.38 LOAN-STA-T53: By type of material (books and brochures, serials, integrating resources, other)

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by type of material according to the categories *books and brochures*, *serials* and *integrating resources* (classification *physical form_8 (books and brochures, serials, integrating resources, other; in respect to the material type)*).

If there were no entered transactions for an individual type of material according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.39 LOAN-STA-T54: By intended purpose/physical form/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by intended purpose according to the categories *O* (printed materials for adults) and *M* (printed materials for youth) (classification *intended purpose_2 (static; children/adults in respect to 100e)*), then by physical form for book and non-book material (classification *physical form_1 (book and non-book material)*). In the columns, the data is shown by UDC groups according to the content of subfield 675s – *Statistics* (classification *UDC 675_1 (static)*).

If there were no entered transactions for an individual type of material according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.40 LOAN-STA-T55: By shelving UDC/physical form – AV collection

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown horizontally by shelving UDC (classification *UDC open access (d\u) 1 (static)*). Vertically, the data is displayed by physical form designation by the categories *video*, *sound recordings* and *electronic resources* (classification *physical form_2 (video, sound recordings, e-resources)*).

If there were no entered transactions for an individual type of material according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.41 LOAN-STA-T56: By department/shelving UDC/physical form – AV collection

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by library departments (classification *department_1 (static)*), then by shelving UDC (classification *UDC open access (d\u) 1 (static)*). In columns, the data is displayed by physical form designation by the categories *gramophone record*, *CD – music*, *cassettes – music*, *music DVD* and *sound recordings – other* (classification *physical form_3 (sound recordings (detailed))*).

If there were no entered transactions for an individual type of material according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by departments and shelving UDC a user classification definition needs to be created for both classifications where you include the departments and shelving UDCs of your library.

B.4.7.42 LOAN-STA-T57: By physical form/intended purpose/shelving UDC (C,P,M,L)/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by physical form for books and other material (classification *physical form_1 (book and non-book material)*), then by intended purpose according to the categories *O* (printed materials for adults) and *M* (printed materials for youth) (classification *intended purpose_2 (static; children/adults in respect to 100e)*) and then by shelving UDC according to the groups C, P, M and L (classification *UDC open access (d\u)_2 (static; C/P/M/L)*). In columns, the data is shown by UDC groups according to the content of subfield 675s – *Statistics* (classification *UDC 675_1 (static)*).

If there were no entered transactions for an individual type of material according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.7.43 LOAN-STA-T58: By physical form/intended purpose

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by physical form in detail for books and non-book material (classification *physical form_4 (book, non-book (detailed))*). In columns, the data is shown by intended purpose according to the

categories *O* (printed materials for adults) and *M* (printed materials for youth) (classification *intended purpose_2 (static; children/adults in respect to 100e)*).

If there were no entered transactions for an individual type of material according to the used classifications, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.8 Statistics in the group Statistics (user classifications) / Transactions / Mobile library

B.4.8.1 LOAN-STA-T44: By stop (at the member)/member category

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by mobile library stops given in the data on the member for which the transactions were entered (classification *mobile library stop_1 (static)*). In the columns, the data is shown for all member categories (classification *member category_5 (static; all categories)*).

If there were no entered transactions for any of the stops or member categories, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by mobile library stops a user classification definition needs to be created for this statistic where you include the mobile library stops of your library.

B.4.8.2 LOAN-STA-T45: By stop (at the member)/physical form (record type)/intended purpose

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by individual mobile library stops given in the data on the member for which the transactions were entered (classification *mobile library stop_1 (static)*) by physical form of the material according to the contents of the subfield *001b - type of record* for *book material, non-book material* and *other* (classification *physical form_1 (static; book/non-book/other in respect to the record type)*). In the columns, the data is shown by intended purpose for the categories *O* (printed materials for adults)

and *M* (printed materials for youth) (classification *intended purpose_2* (static; children/adults in respect to 100e)).

If there are no entered transactions for any of the stops, physical forms of the material or intended purposes, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by mobile library stops a user classification definition needs to be created for this statistic where you include the mobile library stops of your library.

B.4.8.3 LOAN-STA-T46: By stop (at the member)/675s/intended purpose

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by individual mobile library stops given in the data on the member for which the transactions were entered (classification *mobile library stop_1* (static)) by UDC groups according to the contents of the subfield 675s – *Statistics* (classification *UDC 675s_1* (static)). In the columns, the data is shown by intended purpose for the categories *O* (printed materials for adults) and *M* (printed materials for youth) (classification *intended purpose_2* (static; children/adults in respect to 100e)).

If there are no entered transactions for any of the stops, UDC groups or intended purposes, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by mobile library stops a user classification definition needs to be created for this statistic where you include the mobile library stops of your library.

B.4.8.4 LOAN-STA-T47: By stop (at the member)/transaction type

The report shows the data on the number of selected loan transaction in the selected period.

The number of transactions is shown vertically by individual mobile library stops given in the data on the member for which the transactions were entered (classification *mobile library stop_1* (static)). In the columns, the data is shown by individual types of transactions (classification *transaction type_1* (static)).

If there are no entered transactions for any of the stops or transaction types, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by mobile library stops a user classification definition needs to be created for this statistic where you include the mobile library stops of your library. For classification by transactions it makes sense to

create a user classification definition for this statistic where you include the transactions you are especially interested in.

B.4.8.5 LOAN-STA-T48: By stop (at the member)/transaction type/day of the week

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by individual mobile library stops given in the data on the member for which the transactions were entered (classification *mobile library stop_1 (static)*) for individual types of transactions (classification *transaction type_2 (dynamic)*). In the columns, the data is shown for individual days of the week (classification *day of the week_1 (static; all days)*).

If there are no entered transactions for any of the stops, transaction types or days of the week, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by mobile library stops a user classification definition needs to be created for this statistic where you include the mobile library stops of your library.

B.4.8.6 LOAN-STA-T49: By mobile library stop/intended purpose/physical form (record type)/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by individual mobile library stops where the transactions were entered (classification *mobile library stop_1 (static)*), by intended purpose for the categories *O* (printed materials for adults) and *M* (printed materials for youth) (classification *intended purpose_2 (static; children/adults in respect to 100e)*) and by physical forms of the material according to the contents of the subfield *001b - type of record for book material, non-book material and other* (classification *physical form_1 (static; book/non-book/other in respect to the record type)*). In the columns, the data is shown by UDC groups according to the contents of the subfield *675s - Statistics* (classification *UDC 675s_2 (static)*).

If there were no entered transactions for any of the stops, intended purposes, physical forms of the material or UDC, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

For classification by mobile library stops a user classification definition needs to be created for this statistic where you include the mobile library stops of your library.

B.4.8.7 LOAN-STA-T59: By mobile library stop/intended purpose/physical form/675s

The report shows the data on the number of selected loan transactions for the selected period.

The number of transactions is shown vertically by individual mobile library stops where the transactions were entered (classification *mobile library stop_1 (static)*), by intended purpose for the categories *O* (printed materials for adults) and *M* (printed materials for youth) (classification *intended purpose_2 (static; children/adults in respect to 100e)*) and by physical forms for books and non-book material (classification *physical form_1 (book and non-book material)*). In the columns, the data is shown by UDC groups according to the contents of the subfield *675s – Statistics* (classification *UDC 675s_2 (static)*).

If there were no entered transactions for the individual type of material, a hyphen ("-") is displayed.

The summary data is shown in the line and in the column *total*.

B.4.9 Statistics in the group Statistics (user classifications) / Cash register

B.4.9.1 LOAN-STA-CR01: By service type (code list)/month

The report shows the data on the values of selected cash register transactions.

Vertically the data is shown by types of services/debts (classification *service/debt code list_1 (static; all types of services/debts)*). In the columns, the data is shown for all months of the year (classification *months_1 (static; all months)*).

If there were no entered transactions for an individual type of services/debts and month, a hyphen is displayed ("-").

The summary data is shown in the line *total*.

B.4.9.2 LOAN-STA-CR02: By service type (description)/month

The report shows the data on the values of selected cash register transactions.

Vertically the data is shown for individual services/debts (classification *service/debt description_1 (static)*). In the columns, the data is shown for all months of the year (classification *months_1 (static; all months)*).

If there were no entered transactions for an individual service/transaction and month, a hyphen ("-") is displayed.

The summary data is shown in the line *total*.

For classification by individual services/debts, a user classification definition needs to be created for this statistic, where you include those services/debts from your library, for which you want to acquire data.

B.4.9.3 LOAN-STA-CR03: By department/service type (code list)

The report shows the data on the values of selected cash register transactions.

Vertically the data is shown by library departments (classification *department_2 (dynamic)*), and in the columns by types of services/debts (classification *service/debt code list_1 (static; all types of services/debts)*).

If there were no entered transactions in any of the departments for an individual type of service/debt, a hyphen ("-") is displayed.

The summary data is shown in the line *total*.

B.4.9.4 LOAN-STA-CR04: By service type (code list)/member category

The report shows the data on the value of selected cash register transactions.

Vertically the data is shown by the types of services/debts (classification *service/debt code list_1 (static; all types of services/debts)*), and in the columns by member categories (classification *member category_5 (static; all categories)*).

If there were no entered transactions for an individual type of service/debt and category, a hyphen ("-") is displayed.

The summary data is shown in the line *total*.

B.4.9.5 LOAN-STA-CR05: By service type (code list)/day of the month (selection)

The report shows the data on the values of selected cash register transactions.

Vertically the data is shown by types of services/debts (classification *service/debt code list_1 (static; all types of services/debts)*), and in the columns for selected days of the month (classification *day of month_2 (dynamic)*).

If there were no entered transactions for an individual type of service/debt and day of the month, a hyphen ("-") is displayed.

The summary data is shown in the line *total*.

B.4.9.6 LOAN-STA-CR06: By service type (code list)/day of the month

The report shows the data on the values of selected cash register transactions.

Vertically the data is shown by types of services/debts (classification *service/debt code list_1 (static; all types of services/debts)*), and in the columns by individual days of the month (classification *day of month_1 (static; all days)*).

If there were no entered transactions for an individual type of service/debt and day of the month, a hyphen ("-") is displayed.

The summary data is shown in the line *total*.

B.4.9.7 LOAN-STA-CR07: By department/service type (code list)/department of registration

The report shows the data on the values of selected cash register transactions.

Vertically the data is shown by library departments (classification *department_1 (static)*) by types of services/debts (classification *service/debt code list_1 (static; all types of services/debts)*). In the columns, the data is shown by registration department of the member for whom the cash register transaction was entered (classification *department_1 (static)*).

If there were no entered transactions in any of the departments for an individual types of services/debts, a hyphen ("-") is displayed.

The summary data is shown in the line *total*.

For classification by departments a user classification definition needs to be created for this statistic where you include the departments of your library.

B.4.9.8 LOAN-STA-CR08: By username/service type (description)

The report shows the data on the values of selected cash register transactions.

Vertically the data is shown by individual usernames (classification *user_1 (static)*), and in the columns by individual services/debts (classification *service/debt description_2 (dynamic)*).

If there were no entered transactions of an individual service/debt for an individual username, a hyphen ("-") is displayed.

The summary data is shown in the line *total*.

For classification by usernames a user classification definition needs to be created for this statistic where you include the usernames you are interested in.

B.4.9.9 LOAN-STA-CR09: By service type (description)/day of the month (selection)

The report shows the data on the values of selected cash register transactions.

Vertically the detailed data is shown by individual types of services/debts (classification *service/debt description_2 (dynamic)*), and in the columns for selected days of the month (classification *day of month_2 (dynamic)*).

If there were no entered transactions for an individual type of service/debt and day of the month, a hyphen ("-") is displayed.

The summary data is shown in the line *total*.

B.5 CLASSIFICATIONS FOR LOAN

Classification	Description	Category	Use
UDC_1	types of material by UDC in 675s	<ul style="list-style-type: none"> • <i>0*</i> – General • <i>1*</i> – Philosophy. Psychology • <i>2*</i> – Religion. Mythologies • <i>3*</i> – Social sciences • <i>5*</i> – Natural sciences • <i>6*</i> – Applied sciences • <i>7*</i> – Art. Architecture. Music. Photography. Sport • <i>80*</i> – Linguistics • <i>82</i> – (82, 886.3) Literature • <i>9*</i> – Local history and geography. Geography. Biographies. History • <i>other</i> • <i>empty value</i> – material without 675s • <i>all</i> – total 	LOAN-STA-Mt04, LOAN-STA-Mt05, LOAN-STA-Mt09
UDC 675s_1 (static)	types of material by UDC in 675s static classification range	<ul style="list-style-type: none"> • <i>0</i> – General • <i>004</i> – (004, 681.3) Computer science • <i>005</i> – Management • <i>02</i> – Librarianship. Libraries. Library science • <i>08</i> – Comic books, picture books, graphics • <i>1</i> – (1, 133, 159.9, 17) Philosophy. Psychology • <i>2</i> – Religion. Mythologies • <i>3</i> – (3, 31, 32, 33, 34, 35, 36, 37, 39) Social sciences • <i>5</i> – (5, 502, 502/504, 51, 52, 53, 54, 55/56, 57, 58, 59) Natural sciences • <i>6</i> – (6, 61, 62, 63, 64, 65, 66/68, 69) Applied sciences • <i>7</i> – (7, 71/76, 77, 78, 79, 796/799) Art. Architecture. Music. Photography. Sport • <i>79-L</i> – Fictional motion pictures • <i>80</i> – Metrics. Rhetoric. Written communication • <i>81</i> – Linguistics • <i>82.0</i> – Literary science. Literary theory • <i>82</i> – (82, 398-L) Literature • <i>82(091)</i> – Literary history • <i>9</i> – (9, 908, 91, 929, 93/99, 93/94) Local history and geography. Geography. Biographies. History • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T12, LOAN-STA-T19, LOAN-STA-T21, LOAN-STA-T23, LOAN-STA-T27, LOAN-STA-T28, LOAN-STA-T30, LOAN-STA-T32, LOAN-STA-T42, LOAN-STA-T46, LOAN-STA-T51, LOAN-STA-T54, LOAN-STA-T57
UDC 675s_2 (static)	types of material by UDC in	<ul style="list-style-type: none"> • <i>0</i> – (0, 004, 681.3, 005, 02, 08) 	LOAN-STA-T11, LOAN-STA-

	675s static classification range	General <ul style="list-style-type: none"> • 1 – (1, 133, 159.9, 17) Philosophy. Psychology • 2 – Religion. Mythologies • 3 – (3, 31, 32, 33, 34, 35, 36, 37, 39) Social sciences • 5 – (5, 502, 502/504, 51, 52, 53, 54, 55/56, 57, 58, 59) Natural sciences • 6 – (6, 61, 62, 63, 64, 65, 66/68, 69) Applied sciences • 7 – (7, 71/76, 77, 78, 79, 796/799) Arts. Architecture. Music. Photography. Sport • 81 – (80, 81) Linguistics • 82.0 – (82.0, 92(091) Literary science. Literary theory. Literary history • 82 – (82, 398-L, 79-L) Fictional motion pictures • 9 – (9, 908, 91, 929, 93/99, 93/94) Local history and geography. Geography. Biographies. History • other • empty value • all – total 	T13, LOAN-STA-T49, LOAN-STA-T50, LOAN-STA-T59
UDC 675s_3 (dynamic)		<ul style="list-style-type: none"> • dynamic • other • empty value • all – total 	LOAN-STA-Mt08
UDC open access (d <u>u</u>)_1 (static)	types of material by UDC in 996/997d <u>u</u> static classification code list	<ul style="list-style-type: none"> • 0 – General • 1 – Philosophy. Psychology • 2 – Religion. Theology • 3 – Social sciences • 5 – Natural sciences • 6 – Applied sciences. Medicine. Technology • 7 – Arts. Entertainment. Sport • 82 – Literature • 9 – Local history and geography. Geography. Biographies. History • other • empty value • all – total 	LOAN-STA-T16, LOAN-STA-T17, LOAN-STA-T22, LOAN-STA-T26, LOAN-STA-T55, LOAN-STA-T56
UDC open access (d <u>u</u>)_2 – (static; C/P/M/L)	types of material by age level in 996/997d <u>u</u> static classification code list	<ul style="list-style-type: none"> • C – (C, C-1, C-2, C-3/-9) Age level to 7 years • P – (P, P-1, P-2, P-3/-9) Age level from 8 to 14 years • M – (M, M-1, M-2, M-3/-9) Age level from 15 to 18 years • L – (L, foreign) Folk literature • other – UDC arrangement • empty value • all – total 	LOAN-STA-T19, LOAN-STA-T57
UDC_4_range (ratio non-fict.– fict.)	ratio non-fictional – fictional material by UDC in 675s static classification range	<ul style="list-style-type: none"> • non-fiction – material with the following indicator values in subfield 675s - <i>UDC for statistics</i>: 0*, 1*, 2*, 3*, 5*, 6*, 7*, 8, 80*, 81*, 82(091), 82.0 or 9* (asterisk) 	LOAN-STA-Mt10, LOAN-STA-Mt12

		<ul style="list-style-type: none"> used for truncation) <i>fiction</i> – material with remaining indicator values 8* that do not belong to non-fiction in subfield 675s - <i>UDC for statistics</i> <i>other</i> <i>all</i> – total 	
type of material – on loan	types of material according to the bibliographic record	<ul style="list-style-type: none"> <i>01</i> – books <i>11</i> – books – fiction <i>02</i> – serials <i>03</i> – cassettes <i>13</i> – cassettes – fiction <i>23</i> – cassettes – music <i>33</i> – cassettes – entertainment <i>04</i> – CD <i>14</i> – CD – fiction <i>24</i> – CD – music <i>34</i> – CD – entertainment <i>05</i> – videocassettes <i>15</i> – videocassettes – fiction <i>25</i> – videocassettes – music <i>35</i> – videocassettes – entertainment <i>06</i> – floppy discs <i>16</i> – floppy discs – fiction <i>36</i> – floppy discs – entertainment <i>07</i> – CD-ROM <i>17</i> – CD-ROM – fiction <i>27</i> – CD-ROM – music <i>37</i> – CD-ROM – entertainment <i>08</i> – maps <i>09</i> – printed and manuscript music <i>10</i> – objects <i>18</i> – DVD-Audio <i>12</i> – integrating resources <i>22</i> – DVD-Audio – fiction <i>28</i> – DVD-Audio – music <i>38</i> – DVD-audio – entertainment <i>19</i> – DVD-Video <i>26</i> – DVD-Video – fiction <i>29</i> – DVD-Video – music <i>39</i> – <i>DVD-Video</i> – entertainment <i>20</i> – other <i>21</i> – comp. DVD <i>30</i> – comp. DVD – music <i>40</i> – comp. DVD – entertainment <i>other</i> <i>empty value</i> <i>all</i> – total 	LOAN-STA-Mt01, LOAN-STA-Mt02
type of material on loan – code type	types of material – classification for the purposes of statistics in school libraries	<ul style="list-style-type: none"> <i>books – total</i> – books, books – fiction <i>books – fiction</i> – books – fiction <i>serials</i> – serials, integrating resources <i>non-book material</i> – cassettes, CD, videocassettes, floppy discs, CD-ROM, maps, printed and manuscript music, objects, cassettes – fiction, CD – fiction, 	LOAN-STA-Mt06

		<p>videocassettes – fiction, floppy discs – fiction, CD-ROM – fiction, DVD-Audio, DVD-Audio – fiction, DVD-Video, comp. DVD, cassettes – music, CD – music, videocassettes – music, DVD-Video – fiction, CD-ROM – music, DVD-Audio – music, DVD-Video – music, comp. DVD – music, cassettes – entertainment, CD – entertainment, videocassettes – entertainment, floppy discs – entertainment</p> <ul style="list-style-type: none"> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	
language_1	types of material by language	<ul style="list-style-type: none"> • <i>slv</i> – Slovene • <i>other</i> – other languages • <i>all</i> – total 	LOAN-STA-Mt04, LOAN-STA-Mt05
language_2 (dynamic)	types of material by language dynamic classification	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-Mt09
language_3 (static; domestic/foreign)	types of material by language	<ul style="list-style-type: none"> • <i>domestic language</i> • <i>foreign languages</i> • <i>all</i> – total 	LOAN-STA-T50, LOAN-STA-T51, LOAN-STA-T52
language_4 (static; slv/other)	types of material by language	<ul style="list-style-type: none"> • <i>slv</i> – Slovene • <i>other</i> – other languages • <i>all</i> – total 	LOAN-ST-T11, LOAN-STA-T32, LOAN-STA-T37
intended purpose_1 (adults/children)	intended purpose according to 100e – Target audience code	<ul style="list-style-type: none"> • <i>adults</i> – k, m, u, empty value • <i>children</i> – a, b, c, d, e • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-G09 LOAN-STA-T28, LOAN-STA-T38, LOAN-STA-T39
intended purpose_2 (static; children/adults in respect to 100e)	intended purpose according to 100e – Target audience code	<ul style="list-style-type: none"> • <i>O</i> – k, m, u • <i>M</i> – a, b, c, d, e • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T10, LOAN-STA-T11, LOAN-STA-T12, LOAN-STA-T13, LOAN-STA-T19, LOAN-STA-T20, LOAN-STA-T29, LOAN-STA-T30, LOAN-STA-T31, LOAN-STA-T37, LOAN-STA-T45, LOAN-STA-T46, LOAN-STA-T49, LOAN-STA-T50, LOAN-STA-T51, LOAN-STA-T52, LOAN-STA-T55, LOAN-STA-T57, LOAN-STA-T58, LOAN-STA-T59
physical form_1 (static; book/non-book/other in respect to the record type)	type of material according to the attribute "Record type"	<ul style="list-style-type: none"> • <i>a</i> – book material • <i>other</i> – non-book material • <i>all</i> – total 	LOAN-STA-T12, LOAN-STA-T19, LOAN-STA-T36, LOAN-STA-T37, LOAN-STA-T38, LOAN-STA-T39, LOAN-STA-T45, LOAN-STA-T49, LOAN-STA-T50
physical form_2 (static; g/i/j/l in respect to the record type)	type of material according to the attribute "Record type"	<ul style="list-style-type: none"> • <i>1</i> – videorecordings (g) • <i>2</i> – sound recordings (i, j) • <i>3</i> – electronic resources (l) • <i>other</i> – non-book material • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T16, LOAN-STA-T26
physical form_3 (static; sound)	type of material according to the attribute "Record type"	<ul style="list-style-type: none"> • <i>j</i> – sound recordings 	

recordings in respect to the record type)			
physical form_4 (dynamic; in respect to the record type)	record types for which at least one loan transaction was entered	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-Mt03 LOAN-STA-T35, LOAN-STA-T40,
physical form_5 (static; sound recordings in respect to the material type)	type of sound recordings according to the attribute "Type of material"	<ul style="list-style-type: none"> • 2 – sound recordings – CD (music) (04, 24) • 3 – sound recordings – cassettes (music) (03,23) • 4 – sound recordings – DVD (music) (18, 28) • 5 – sound recordings – other (13, 14, 15, 22) • <i>other</i> – non-book material • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T17
physical form_6 – (static; all types of material)	all types of material according to the attribute "Type of material"	<ul style="list-style-type: none"> • 01 – books • 02 – serials • 03 – cassettes • 04 – CD • 05 – videocassettes • 06 – floppy discs • 07 – CD-ROM • 08 – maps • 09 – printed and manuscript music • 10 – objects • 11 – books – fiction • 12 – integrated resources • 13 – cassettes – fiction • 14 – CD – fiction • 15 – videocassettes – fiction • 16 – floppy discs – fiction • 17 – CD-ROM – fiction • 18 –DVD-Audio • 19 –DVD-Video • 20 – other • 21 – comp. DVD • 22 – DVD-Audio – fiction • 23 – cassettes – music • 24 – CD – music • 25 – videocassettes – music • 26 – DVD-Video – fiction • 27 – CD-ROM – music • 28 –DVD-Audio – music • 29 – DVD-Video – music • 30 – comp. DVD – music • 33 – cassettes – entertainment • 34 – CD – entertainment • 35 – videocassettes – entertainment • 36 – floppy discs – entertainment • 37 – CD-ROM – entertainment • 38 –DVD-Audio – entertainment • 39 – DVD-Video – entertainment • 40 – comp. DVD – entertainment • <i>other</i> – non-book material 	LOAN-STA-T20

		<ul style="list-style-type: none"> • <i>empty value</i> • <i>all</i> – total 	
physical form_7 (dynamic; in respect to the material type)	types of material for which at least one loan transaction was entered	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	
physical form_8 (dynamic; in respect to the material type)	types of material in respect to the "Type of material" attribute	<ul style="list-style-type: none"> • <i>books and brochures</i> – books, books – fiction • <i>serials</i> • <i>integrating resources</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T53
physical form_1 (book and non-book material)	physical form in respect to the "Physical form" attribute	<ul style="list-style-type: none"> • <i>book material</i> – (a, ad, af, ar) • <i>non-book material</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T54, LOAN-STA-T57, LOAN-STA-T59
physical form_2 (video, sound recordings, e-resources)	physical form in respect to the "Physical form" attribute	<ul style="list-style-type: none"> • <i>videorecordings</i> – (g, ga, gaa, gab, gac, gad, gau, gaz, gb, gbg, gbh, gbi, gbj, gbk, gbl, gbu, gbz, gc, gca, gcb, gcbk, gcbl, gcc, gcd, gce, gcz) • <i>sound recordings</i> – (i, ia, ib, ic, id, ie, if, ig, ih, ii, ij, iz, j, ja, jb, jc, jd, je, jf, jg, jh, ji, jj, jz) • <i>electronic resources</i> – (l, la, lb, lc, ld, le, lf, lg, lh, li, lj, lz) • <i>other</i> – other material • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T55
physical form_3 (sound recordings (detailed))	physical form in respect to the "Physical form" attribute	<ul style="list-style-type: none"> • <i>gramophone record</i> – (ja) • <i>CD – music</i> – (ji) • <i>cassettes – music</i> – (jc) • <i>music DVD</i> – (jj) • <i>sound recordings – other</i> – (j, jb, jd, je, jf, jg, jh, jz) • <i>other</i> – other material • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T56
physical form_4 (book, non-book (detailed)) ¹	physical form in respect to the "Physical form" attribute	<ul style="list-style-type: none"> • <i>textual materials (book)</i> – (a, ad, af, ar) textual materials – book • <i>microforms</i> – (ag, bg) microforms • <i>handwritten mat.</i> – (b, d, f) handwritten material • <i>printed music</i> – (c) printed music • <i>cartographic mat.</i> – (ea, eb, ec, ed, ee, ef, eg, eh, ei, ej, ez) cartographic material • <i>video DVD</i> – (gcbk) video DVD • <i>proj. mat. (slides, transp., diafilms)</i> – (gb, gbg, gbh, gbi, gbj, gbk, gbl, gbu, gbz) visual projection (slides, transparencies, diafilms) • <i>videorec., motion pict.</i> – (g, ga, gaa, gab, gac, gad, gau, gaz, gc, gca, gcb, gcbl, gcc, gcd, gce, gcz) 	

¹ See description on the link *Rules for defining the physical form of material*.

		<ul style="list-style-type: none"> videorecordings, motion pictures • <i>s. rec. – disks</i> – (ia, ja) sound recordings – disks • <i>s. rec. – CD</i> – (ii, ji) sound recordings – CD • <i>s. rec. – cassettes (non-music)</i> – (ic) sound recordings – cassettes (non-music) • <i>s. rec. – cassettes (music)</i> – (jc) sound recordings – cassettes (music) • <i>s. rec. – DVD</i> – (ij, jj) sound recordings – DVD • <i>s. rec. – other</i> – (i, ib, id, ie, if, ig, ih, iz, j, jb, jd, je, jf, jg, jh, jz) sound recordings – other • <i>graphics</i> – (k, ka, kaa, kab, kac, kad, kae, kaf, kag, kah, kai, kaj, kb, kc, kd, ke, kf, kh, ki, kk, kuu, kvv, kz, kzz) graphics • <i>electronic r.</i> – (l, la, lb, lc, ld, le, lf, lg, lh, li, lj, lz) electronic resources • <i>multimedia</i> – (m, ai) multimedia • <i>three-dim. artef. and realia</i> – (r, raa, rab, rac, rad, rae, raf, rag, rah, rai, raj, rak, ral, ram, ran, rao, rap, raq, rar, ras, rat, rba, rbb, rbc, rbd, rbe, rbf, rbh, rbi, rbj, ruu, rvv, rzz) three-dimensional artefacts and realia • <i>ephemera</i> – (aj) ephemera • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	
physical form_5 (dynamic)	physical form in respect to the "Physical form" attribute	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	
financier_1 (static)	financier from the subfield 996/9974	<ul style="list-style-type: none"> • <i>MK</i> – Ministry of Culture • <i>OBC</i> – Municipality • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T21
financier_2 (dynamic)	financier from the subfield 996/9974	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	
acquisition type_1 (static; all types)	acquisition type from the subfield 996/997v	<ul style="list-style-type: none"> • <i>a</i> – purchase • <i>b</i> – exchange • <i>c</i> – gift • <i>d</i> – legal deposit • <i>e</i> – old stock • <i>f</i> – own edition • <i>g</i> – registration fee • <i>h</i> – subsidy • <i>i</i> – membership • <i>u</i> – institutional deposit • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T22, LOAN-STA-T23

acquisition_type_2 (dynamic)	acquisition type from the subfield 996/997v	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	
sublocation_1 (static)	sublocation in the call number from the subfield 996/997d\l	<ul style="list-style-type: none"> • <i>K</i> – library • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T22, LOAN-STA-T23
sublocation_2 (dynamic)	sublocation in the call number from the subfield 996/997d\l	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T36
shelving location_1 (dynamic)	shelving location in the call number from the subfield 996/997d\i	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	
shelving location_2 (static)	shelving location in the call number from the subfield 996/997d\i	<ul style="list-style-type: none"> • <i>ak</i> – audiocassettes • <i>cd</i> – CD • <i>cdr</i> – CD-ROM • <i>dvd</i> – DVD • <i>empty value</i> • <i>other</i> • <i>all</i> – total 	LOAN-STA-T18
member category_1	member categories	<ul style="list-style-type: none"> • <i>001</i> – pre-school children • <i>002</i> – primary school pupils • <i>003</i> – secondary school pupils • <i>004</i> – students (full-time) • <i>005</i> – students (part-time) • <i>006</i> – employed • <i>007</i> – independent professions • <i>008</i> – private entrepreneurs/craftsmen • <i>009</i> – farmers • <i>010</i> – housewives • <i>011</i> – retirees • <i>012</i> – non-employed • <i>013</i> – foreign nationals • <i>014</i> – employees at parent institution • <i>015</i> – employees at university • <i>016</i> – soldiers • <i>017</i> – honorary members • <i>018</i> – unemployed • <i>019</i> – family membership card • <i>020</i> – postgraduate students • <i>099</i> – other • <i>124</i> – institution's organizational units • <i>125</i> – legal entities - ext. institutions • <i>empty value</i> – other (non-members) • <i>all</i> – total 	LOAN-STA-VT01, LOAN-STA-VT02 LOAN-STA-Mb06
member category_2	member categories – classification for the purposes of statistics in school libraries	<ul style="list-style-type: none"> • <i>pupils or students</i> – 002, 003 • <i>students</i> – 004, 005 • <i>other</i> – 001, 006, 007, 008, 009, 010, 011, 012, 013, 014, 015, 016, 017, 018, 019, 020, 099, 124, 125, 126 	LOAN-STA-Mt06

		<ul style="list-style-type: none"> • <i>all</i> – total 	
member category_3	member categories – classification for the purposes of statistics in school libraries	<ul style="list-style-type: none"> • <i>pupils or students</i> – 002, 003 • <i>students</i> – 004, 005 • <i>other</i> – 001, 006, 007, 008, 009, 010, 011, 012, 013, 014, 015, 016, 017, 018, 019, 020, 099, 124, 125, 126 • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-A01
member category_4 (youth/adults/other)	member category – classification: youth, adults, other	<ul style="list-style-type: none"> • <i>youth</i> – 001, 002 • <i>adults</i> – 003, 004, 005, 006, 007, 008, 009, 010, 011, 012, 013, 014, 015, 016, 017, 018, 019, 020, 099 • <i>other</i> – 124, 125, 126 • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-Mt10, LOAN-STA-Mt11, LOAN-STA-Mt12
member category_5 (static; all categories)	member categories	<ul style="list-style-type: none"> • <i>001</i> – pre-school children • <i>002</i> – primary school pupils • <i>003</i> – secondary school pupils • <i>004</i> – students (full-time) • <i>005</i> – students (part-time) • <i>006</i> – employed • <i>007</i> – independent profession • <i>008</i> – private entrepreneurs/craftsmen • <i>009</i> – farmers • <i>010</i> – housewives • <i>011</i> – retirees • <i>012</i> – non-employed • <i>013</i> – foreign nationals • <i>014</i> – employees at parent institution • <i>015</i> – employees at university • <i>016</i> – soldiers • <i>017</i> – honorary members • <i>018</i> – unemployed • <i>019</i> – family membership card • <i>020</i> – postgraduate students • <i>099</i> – other • <i>124</i> – institution's organizational units • <i>125</i> – legal entities - ext. institutions • <i>126</i> – units for interdepartmental loan • <i>other</i> – other • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-CR04 LOAN-STA-V13, LOAN-STA-V15, LOAN-STA-V16, LOAN-STA-V17 LOAN-STA-Mb01, LOAN-STA-Mb02, LOAN-STA-Mb03, LOAN-STA-Mb04, LOAN-STA-Mb11, LOAN-STA-Mb31, LOAN-STA-Mb32, LOAN-STA-Mb33, LOAN-STA-Mb34, LOAN-STA-Mb41 LOAN-STA-T15, LOAN-STA-T32, LOAN-STA-T38, LOAN-STA-T40, LOAN-STA-T44,
member category_6 (static; youth/adults/others)	member categories	<ul style="list-style-type: none"> • <i>youth</i> – 001, 002 • <i>adults</i> – 003, 004, 005, 006, 007, 008, 009, 010, 011, 012, 013, 014, 015, 016, 017, 018, 019, 020, 099 • <i>other</i> – 124, 125, 126 • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-V12, LOAN-STA-V20 LOAN-STA-T21
member category_7 (dynamic)		<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-Mb05, LOAN-STA-Mb06, LOAN-STA-Mb07, LOAN-STA-Mb09, LOAN-STA-Mb10

			LOAN-STA-Mb35, LOAN-STA-Mb36, LOAN-STA-Mb37, LOAN-STA-Mb39, LOAN-STA-Mb40 LOAN-STA-T01, LOAN-STA-T02, LOAN-STA-T03 LOAN-STA-VT01, LOAN-STA-VT02, LOAN-STA-VT05, LOAN-STA-VT06
member category_8 (dynamic)	member categories	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>empty value</i> – non-members • <i>all</i> – total 	LOAN-STA-Mb12, LOAN-STA-Mb42
member category_9	member categories	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>all</i> – total 	LOAN-STA-A02
member category_10 (dynamic)	member categories	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>all</i> – total 	LOAN-STA-A03, LOAN-STA-A04
municipalities_1 (dynamic)	municipalities in Slovenia	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-Mb10, LOAN-STA-Mb33, LOAN-STA-Mb40 LOAN-STA-V15 LOAN-STA-T03 LOAN-STA-VT05
municipalities_2 (static; all municipalities)	municipalities in Slovenia	<ul style="list-style-type: none"> • <i>municipalities (code and resolution)</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T14, LOAN-STA-T15 LOAN-STA-Mb03
municipalities_3 (dynamic; without other)	municipalities in Slovenia; without value <i>other</i>	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-A03
municipalities_4 (static; some municipalities)	Some municipalities in Slovenia	<ul style="list-style-type: none"> • <i>070</i> – Maribor • <i>107</i> – Rogatec • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	
gender_1 (static)	member gender	<ul style="list-style-type: none"> • <i>1</i> – male • <i>2</i> – female • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-Mb02, LOAN-STA-Mb08, LOAN-STA-Mb09, LOAN-STA-Mb32, LOAN-STA-Mb39 LOAN-STA-V14
mobile library stop_1 (static)	mobile library stops	<ul style="list-style-type: none"> • <i>Stop 01</i> – stop 01 • <i>Stop 02</i> – stop 02 • <i>Stop 03</i> – stop 03 • <i>Stop 04</i> – stop 04 • <i>Stop 05</i> – stop 05 • <i>Stop 06</i> – stop 06 • <i>Stop 07</i> – stop 07 • <i>Stop 08</i> – stop 08 • <i>Stop 09</i> – stop 09 • <i>Stop 10</i> – stop 10 • <i>Stop 99</i> – final stop • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T44, LOAN-STA-T45, LOAN-STA-T46, LOAN-STA-T47, LOAN-STA-T48, LOAN-STA-T49, LOAN-STA-T59 LOAN-STA-V20, LOAN-STA-Mb04, LOAN-STA-Mb34
mobile library stop_2 (dynamic)	mobile library stops, where at least one loan transaction was entered	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-VT06 LOAN-STA-Mb11, LOAN-STA-Mb41
department_1 (static)	departments	<ul style="list-style-type: none"> • <i>Department 01</i> • <i>Department 02</i> 	LOAN-STA-Mb08 LOAN-STA-T25, LOAN-STA-T26, LOAN-STA-T27, LOAN-

		<ul style="list-style-type: none"> • <i>Department 03</i> • <i>Department 04</i> • <i>Department 05</i> • <i>Department 06</i> • <i>Department 07</i> • <i>Department 08</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	STA-T28, LOAN-STA-T29, LOAN-STA-T30, LOAN-STA- T31, LOAN-STA-T32, LOAN- STA-T33, LOAN-STA-T34, LOAN-STA-T35, LOAN-STA- T37, LOAN-STA-T38, LOAN- STA-T39, LOAN-STA-T40, LOAN-STA-T51, LOAN-STA- T52, LOAN-STA-T56 LOAN-STA-CR07 LOAN-STA-V13, LOAN-STA- V14, LOAN-STA-V16, LOAN- STA-V17, LOAN-STA-V18, LOAN-STA-V19
department_2 (dynamic)	departments, where at least one loan transaction was entered	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-CR03 LOAN-STA-T36, LOAN-STA- T41, LOAN-STA-T42, LOAN- STA-T43 LOAN-STA-V15 LOAN-STA-Mb05, LOAN-STA- Mb06, LOAN-STA-Mb07, LOAN-STA-Mb09, LOAN-STA- Mb10, LOAN-STA-Mb35, LOAN-STA-Mb36, LOAN-STA- Mb37, LOAN-STA-Mb39, LOAN-STA-Mb40
active months	months, when at least one loan transaction was entered	<ul style="list-style-type: none"> • <i>January</i> – 1 • <i>February</i> – 2 • <i>March</i> – 3 • <i>April</i> – 4 • <i>May</i> – 5 • <i>June</i> – 6 • <i>July</i> – 7 • <i>August</i> – 8 • <i>September</i> – 9 • <i>October</i> – 10 • <i>November</i> – 11 • <i>December</i> – 12 • <i>all</i> – total 	LOAN-STA-Mt01, LOAN-STA- Mt04, LOAN-STA-Mt07, LOAN- STA-Mt08, LOAN-STA-Mt09, LOAN-STA-Mt11 LOAN-STA-T01 LOAN-STA-VT01, LOAN-STA- VT03
months_1 (static; all months)	months of the year	<ul style="list-style-type: none"> • <i>January</i> – 1 • <i>February</i> – 2 • <i>March</i> – 3 • <i>April</i> – 4 • <i>May</i> – 5 • <i>June</i> – 6 • <i>July</i> – 7 • <i>August</i> – 8 • <i>September</i> – 9 • <i>October</i> – 10 • <i>November</i> – 11 • <i>December</i> – 12 • <i>all</i> – total 	LOAN-STA-CR01, LOAN-STA- CR02 LOAN-STA-Mb07, LOAN-STA- Mb37 LOAN-STA-V12, LOAN-STA- V13, LOAN-STA-V14, LOAN- STA-V15, LOAN-STA-V16, LOAN-STA-V19, LOAN-STA- V20 LOAN-STA-T27, LOAN-STA- T33, LOAN-STA-T34, LOAN- STA-T35, LOAN-STA-T39
day of week_1 (static; all days)	days of the week	<ul style="list-style-type: none"> • <i>Monday</i> – 1 • <i>Tuesday</i> – 2 • <i>Wednesday</i> – 3 • <i>Thursday</i> – 4 • <i>Friday</i> – 5 • <i>Saturday</i> – 6 • <i>Sunday</i> – 7 • <i>other</i> – available 	LOAN-STA-V10 LOAN-STA-T34, LOAN-STA- T48

		<ul style="list-style-type: none"> • <i>all</i> – total 	
day of month_1 (static; all days)	days of the month	<ul style="list-style-type: none"> • <i>01</i> – 1 • <i>02</i> – 2 • <i>03</i> – 3 • <i>04</i> – 4 • <i>05</i> – 5 • <i>06</i> – 6 • <i>07</i> – 7 • <i>08</i> – 8 • <i>09</i> – 9 • <i>10</i> – 10 • <i>11</i> – 11 • <i>12</i> – 12 • <i>13</i> – 13 • <i>14</i> – 14 • <i>15</i> – 15 • <i>16</i> – 16 • <i>17</i> – 17 • <i>18</i> – 18 • <i>19</i> – 19 • <i>20</i> – 20 • <i>21</i> – 21 • <i>22</i> – 22 • <i>23</i> – 23 • <i>24</i> – 24 • <i>25</i> – 25 • <i>26</i> – 26 • <i>27</i> – 27 • <i>28</i> – 28 • <i>29</i> – 29 • <i>30</i> – 30 • <i>31</i> – 31 • <i>other</i> – available • <i>all</i> – total 	LOAN-STA-CR06 LOAN-STA-T24, LOAN-STA-T31, LOAN-STA-T43 LOAN-STA-V11, LOAN-STA-V18
day of month_2 (dynamic)	days, when at least one transaction was entered	<ul style="list-style-type: none"> • <i>01</i> – 1 • <i>02</i> – 2 • <i>03</i> – 3 • <i>04</i> – 4 • <i>05</i> – 5 • <i>06</i> – 6 • <i>07</i> – 7 • <i>08</i> – 8 • <i>09</i> – 9 • <i>10</i> – 10 • <i>11</i> – 11 • <i>12</i> – 12 • <i>13</i> – 13 • <i>14</i> – 14 • <i>15</i> – 15 • <i>16</i> – 16 • <i>17</i> – 17 • <i>18</i> – 18 • <i>19</i> – 19 • <i>20</i> – 20 • <i>21</i> – 21 • <i>22</i> – 22 • <i>23</i> – 23 • <i>24</i> – 24 • <i>25</i> – 25 	LOAN-STA-CR05, LOAN-STA-CR09

		<ul style="list-style-type: none"> • 26 – 26 • 27 – 27 • 28 – 28 • 29 – 29 • 30 – 30 • 31 – 31 • <i>other</i> – available • <i>all</i> – total 	
member age_1 (static; children/adults according to the year of birth)	age groups of members by year of birth	<ul style="list-style-type: none"> • <i>youth</i> – 2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020 • <i>other – adults</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T30 LOAN-STA-Mb06, LOAN-STA-Mb08, LOAN-STA-Mb36 LOAN-STA-V14
year of accessioning_1 (dynamic)	by year of accessioning	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other – adults</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-T18, LOAN-STA-T22, LOAN-STA-T23
year of accessioning_2 (static, 10-year period/older)	by year of accessioning	<ul style="list-style-type: none"> • 19 – 2019 • 18 – 2018 • 17 – 2017 • 16 – 2016 • 15 – 2015 • 14 – 2014 • 13 – 2013 • 12 – 2012 • 11 – 2011 • 10 – 2010 • 09 – 2009 • <i>other – older material</i> • <i>empty value</i> • <i>all</i> – total 	
by hours_1 (dynamic)	by hours, when at least one loan transaction was entered	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>all</i> – total 	LOAN-STA-VT07
by hours_2 (static)	by hours	<ul style="list-style-type: none"> • 0 – 00.00–1:00 • 1 – 1.00–2.00 • 2 – 2.00–3.00 • 3 – 3.00–4.00 • 4 – 4.00–5.00 • 5 – 5.00–6.00 • 6 – 6.00–7.00 • 7 – 7.00–8.00 • 8 – 8.00–9.00 • 9 – 9.00–10.00 • 10 – 10.00–11.00 • 11 – 11.00–12.00 • 12 – 12.00–13.00 • 13 – 13.00–14.00 • 14 – 14.00–15.00 • 15 – 15.00–16.00 • 16 – 16.00–17.00 • 17 – 17.00–18.00 • 18 – 18.00–19.00 • 19 – 19.00–20.00 • 20 – 20.00–21.00 • 21 – 21.00–22.00 • 22 – 22.00–23.00 	LOAN-STA-V10, LOAN-STA-V11, LOAN-STA-V17, LOAN-STA-V18, LOAN-STA-T24, LOAN-STA-T31, LOAN-STA-T34, LOAN-STA-T43

		<ul style="list-style-type: none"> • 23 – 23.00–00.00 • all – total 	
transaction type_1 (static)	transactions	<ul style="list-style-type: none"> • 11 – outside loan • 63 – reserving currently unavailable material via COBISS+ and mCOBISS² • 64 – reserving available material via COBISS+ and mCOBISS² • 13 – reserving currently unavailable material • 14 – reserving available material • other • empty value • all – total 	LOAN-STA-T25, LOAN-STA-T42, LOAN-STA-T47
transaction type_2 (dynamic)	type of transactions entered in the selected period	<ul style="list-style-type: none"> • dynamic • other • empty value • all – total 	LOAN-STA-T41, LOAN-STA-T43, LOAN-STA-T48
transaction type_3 (static; all types of transactions)	transactions	<ul style="list-style-type: none"> • 1 – member registration • 10 – updating temporary note about the material • 11 – outside loan • 12 – reading room loan • 13 – reserving currently unavailable material • 14 – reserving available material • 15 – allocating reserved material to member • 16 – loan renewal • 17 – return/delete material from member's records • 18 – return with restriction • 19 – entering loss of material • 2 – change of member data • 20 – copy description • 21 – change of due date • 22 – start of routing • 23 – reading room transaction • 24 – visit by member (internet access) • 25 – reading room reservation • 26 – renewal via telephone • 27 – updating note about the material • 28 – end of routing • 29 – visit by non-member • 30 – interdepartmental loan • 32 – payment entry • 33 – visit by member (reading room) • 34 – batch deletion of data on inactive members • 39 – manual editing of the reservations list • 4 – deletion of member details • 41 – interlibrary loan • 47 – interlibrary return 	

² Your country may use an older version of the online catalogue COBISS/OPAC.

		<ul style="list-style-type: none"> • 5 – entering a note for the member (only in COBISS2/Loan) • 51 – online member registration • 52 – change of data via COBISS+ and mCOBISS³ • 6 – change of number • 63 – reserving currently unavailable material via COBISS/OPAC • 64 – reserving available material via COBISS/OPAC • 65 – allocating reserved material to member as reservation was cancelled via COBISS/OPAC • 66 – renewal via COBISS/OPAC • 67 – cancellation of reservation via COBISS+ and mCOBISS • 7 – visit by member - miscellaneous • 8 – placing material to the mobile library location • 9 – return of material from the mobile library location • empty value • all – total 	
service/debt code list_1 (static; all types of services/debts)	type of service/debt	<ul style="list-style-type: none"> • 01 – CLA membership fee/admission fee • 02 – IZP loan fee/wear and tear fee • 03 – ZAM fine • 04 – 1OP 1. overdue notice • 05 – 2OP 2. overdue notice • 06 – 3OP 3. overdue notice • 07 – 4OP 4. overdue notice • 08 – TOZ lawsuit or recovery • 09 – MKI interlibrary loan • 10 – IZG lost material • 11 – POS damaged material • 12 – IZK lost membership card • 13 – FOT photocopies • 14 – REZ notif. about received material • 15 – ZCI fine – read. room • 16 – NAR res. of available copy • 17 – COM use of computer • 18 – PNT printing on printers • 19 – SCR costs of queries • 20 – CON expert consultation • 21 – DON volunt. contributions • 22 – NIZ new membership card • 23 – ZNR uncollected material • 24 – CLS membership fee – individual • 27 – VRA return in another depart. • 98 – ZST fine (old price) • 99 – OST other • other – other • empty value – empty value 	LOAN-STA-CR01, LOAN-STA-CR03, LOAN-STA-CR04, LOAN-STA-CR05, LOAN-STA-CR06, LOAN-STA-CR07

³ Your country may use an older version of the online catalogue COBISS/OPAC.

		<ul style="list-style-type: none"> • <i>all</i> – total 	
service/debt code list_2 (dynamic)	type of service/debt	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	
service/debt description_1 (static)	service/debt – description	<ul style="list-style-type: none"> • <i>membership fee – employed</i> • <i>photocopies – A4</i> • <i>new membership card</i> • <i>fine – books</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-CR02
service/debt description_2 (dynamic)	service/debt – description	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-CR08, LOAN-STA-CR09
user_1 (static)	username	<ul style="list-style-type: none"> • <i>user 1</i> • <i>user 2</i> • <i>other</i> • <i>all</i> – total 	LOAN-STA-CR08 LOAN-STA-T24, LOAN-STA-T41
user_2 (dynamic)	username	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	
university (dynamic)	universities	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-Mb12, LOAN-STA-Mb42
university in eVŠ (dynamic)	universities in eVŠ	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-Mb12, LOAN-STA-Mb42
class/grade (dynamic)	classes or grades	<ul style="list-style-type: none"> • <i>dynamic</i> • <i>other</i> • <i>empty value</i> • <i>all</i> – total 	LOAN-STA-VT03, LOAN-STA-VT04 I-STA-OT03, I-STA-OT04

C EQUIPMENT LOAN

Libraries enter equipment data (objects, technical accessories, keys for renting lockers, etc.) in a special database. Equipment is not library material but the libraries want to loan it to the members nevertheless.

This appendix describes the procedure for entering equipment data and the procedures for entering the equipment for library members. There is a dedicated folder for the equipment in the COBISS3/Loan software module named **Equipment loan** that includes four classes: **Equipment**, **Unavailable equipment**, **Equipment transactions**, **Equipment counters**.

Subchapters:

- Equipment data
- Entered equipment
- Equipment transactions

C.1 EQUIPMENT DATA

You enter the equipment data in the **Equipment** editor. For accessioning the equipment with an automatic counter you can set the appropriate value of the equipment counter.

Subchapters:

- Setting the equipment counter
- Entering equipment data
- Multiplying equipment data
- Deleting equipment
- Entering a note for loan
- Searching equipment

C.1.1 Setting equipment counter

Before you start accessioning the equipment NCC sets the current counter value as agreed with the library. The counters that are already set for the library material holdings are taken into account during this procedure.



Note:

The accession numbers of the equipment cannot overlap with the accession numbers of the library material. In order to avoid this, the accession number of the equipment and the accession number of the library material should have different lengths. If, however, the accession numbers have the same lengths, you specify a certain criterion (leading number or a specific range) to avoid an overlap of accession numbers.

To avoid overlapping with the membership card number the accession number of the equipment must not be 7 digits long.

In order to change the counter setting manually at a later time you need the privilege *LOAN_EDT – Changing loan parameters*.

Procedure

1. Find and select the counter in the **Equipment counters** class.
Because there is only one object (counter) in the class, you can load it to the workspace by double clicking the **Counters** class.
2. Select the method **Object / Edit**.
The **Equipment counters** editor is opened.
3. Enter the appropriate number under "Current inventory number value".
4. Save the change.

The number you entered will be displayed under "Accession number" during the next equipment accessioning.

C.1.2 Entering equipment data

You enter the data for each equipment item in the **Equipment** editor.

Procedure

1. Highlight the **Equipment** class.
2. Select the method **Class / New object**.
The **Equipment** editor is opened.
3. Under "Group symbol" enter the code of the group or select the group symbol from the local code list *Inventory group symbol (CODE 324)*.



Examples:

1. *read – e-reader*
2. *usb – USB flash drive*
3. *cha1 – phone charger, cha2 – laptop charger, cha3 – e-reader charger*
4. *sta1 – e-reader stand, sta2 – laptop stand*
5. *key1 – locker (small), key2 – locker (large)*

4. Under "Name" enter the short name of the equipment.



Examples:

1. *Kindle Voyage, Amazon Voyage, Amazon Kindle*
2. *Kingston*
3. *Samsung, HP*
4. *desktop stand, cooling pad*
5. *small locker, large locker*

5. Under "Second name" you can enter the second name of the equipment.
By using the second name you ensure distinguishing of equipment with the same name.



Examples:

1. To distinguish the e-reader Amazon Kindle Paperwhite: *Paperwhite*.
2. To distinguish Kingston USB flash drives: *32 GB DTSE9, 64 GB HyperX DTHX30*.
3. To distinguish Samsung laptop chargers: *ETA-P11EBEGSTD, ETA-U90EBEGSTD*.
4. To additionally name a universal desktop stand you can enter *universal*, to additionally name a laptop cooling pad you can enter *for laptops*.
5. To distinguish keys for a small locker: *A 001, B 106*.

6. Under "Year" you can enter the production year of the equipment.
7. Under "Physical description" you can enter the physical description of the equipment.
8. To enter notes on the equipment click the **Notes** button.
9. Under "Sublocation (d\l)" enter the sublocation or select it from the local code list.
10. Under "Shelving location (d\i)" enter the shelving location or select it from the local code list.
11. If you want to further specify the equipment storage area, you can enter a short name of the area, where the equipment is stored, under "Storage area" or select it from the local code list *Equipment storage area (CODE 327)*.



Examples:

1. *REset – reader, set; RE – reader*
2. *USB – USB flash drive*
3. *ACel – accessories, electric; ACav – accessories, au/vi*
4. *AC – accessories, miscellaneous*

12. Under "Short name" you can specify the equipment storage area even further if there is different equipment stored in an area.



Examples:

drawer up, drawer down, shelf left, shelf right, etc.

13. Under "Price" you usually enter the gross price from the supplier's invoice that includes the basic price, discounts, shipping and handling, profit margin and VAT. In front of the price you enter the currency abbreviation in all caps. You can enter the price with two decimal places; if the amount has no decimal places, you can leave out the decimal comma and zeros that represent the decimal part of the number. The thousands and the hundreds must be separated by the character ".".



Examples:

EUR 10

EUR 10,50

EUR 1.500,20

GBP 100,55

14. You can enter the accession number manually or assign it with an automatic counter (see chapter *C.1.1*). After you click the **Specify number** button, the first available accession number after the last number assigned with an automatic counter is offered.

15. Under "Date of accessioning" you enter the date, when you specified the accession number.

When specifying the accession number with the counter the current date is automatically entered under "Date of accessioning".

16. Highlight "For reading room" if the equipment is intended for loan in the reading room.

17. Under "Status" select the value from the drop-down list.

When adding new equipment the value 2 – *in process* is selected.



Note:

Specify the status 1 – for loan for the equipment you want to loan.

18. Under "Status date" enter the date when you specified the status.

When adding new equipment the current date is specified automatically.

19. Under "Loan period" enter the time of outside loan by entering the number of days or the number of months (e.g. *21d* or *1m*).

If the equipment has the status 1 – *for loan* or 3 – *damaged*, you need to enter the time of loan.

If you enter *0d*, outside loan is not possible, but you can loan the equipment to the reading room.



Tip:

If you want only workdays to be taken into account, you add the character "*" before the number (e.g. **5d* – five workdays).



Note:

If the date, which is calculated on the basis of the entered loan time, is a non-working day, the first upcoming workday is automatically specified as the new date.

20. Under "Loan renewal period" you enter the loan period by entering the number of days or the number of months (e.g. *21d* or *1m*).

If you enter *0d*, the loan cannot be renewed.



Tip:

If you want only workdays to be taken into account, you add the character "*" before the number (e.g. **5d* – five workdays).



Note:

If the date calculated based on the entered time of loan is a non-working day, the new date is specified automatically on the next workday.

21. Under "Restricted renewals" you enter the number of loan renewal periods in the library.
22. Under "Loan fee" you enter the amount of wear and tear fee that you will charge to the member for the loan (when loaning equipment the automatic entry is not supported). In front of the amount you enter the currency. You can enter the amount with two decimal places; if the amount has no decimal places, you can leave out the decimal comma and zeros that represent the decimal part of the number.
23. Under "Security deposit" you enter the amount that you will charge to the member for the loan in order to ensure the return of the loaned equipment (when loaning equipment the automatic entry is not supported). In front of the amount you enter the currency. You can enter the amount with two decimal places; if the amount has no decimal places, you can leave out the decimal comma and zeros that represent the decimal part of the number.
- When the equipment is returned you return the security deposit to the member.
24. Highlight "Loan consent required" if the member needs to sign a document prepared for this purpose during the loan process.
25. If you click the **Print label** button, you can print the label for the equipment; the size of the label is 60 x 40. The format and the contents of the label are uniform across all libraries.

You can print the label immediately or send it to the report queue.



Note:

The equipment label is sent to the printer that is selected for printing equipment labels (logical destination Label – equipment).

The name of the library is written horizontally at the top of the label. The attribute data "Sublocation (d\l)", "Shelving location (d\i)" and "Storage area" are written under the name of the library in coded form. The coded value of the attribute "Group symbol" and the name of the equipment are written in the next line and beneath that the value of the attribute "Second

name". The barcode and the accession number are written at the bottom of the label.

The label can also be printed by finding the equipment in the **Equipment** class and selecting the method **Object / Print** or the method **Object / Send**. You can print multiple labels simultaneously by highlighting the **Equipment** class and selecting the method **Class / Send** where you find and select the equipment for which you would like to print out labels.

C.1.3 Multiplying equipment data

An equipment item can be multiplied. The data from the following attributes of the basic equipment is copied to the new equipment item: "Group symbol", "Name", "Second name", "Year", "Sublocation (d\l)", "Shelving location (d\i)", "Storage area", "Short name" and "Loan period"; under "Status" the value 2 – *in process* is selected automatically, and under "Status date" the current date is set automatically.

Procedure

1. Find and select the equipment in the **Equipment** class.
2. Select the method **Object / Multiply equipment**.

The **Multiplying of equipment** window will open.

You enter the number of equipment items that you would like to have.

Highlight "Open editors for equipment" if you would like to view and update the data on new equipment items.

3. Click the **OK** button.

The new equipment items are loaded to the workspace.

C.1.4 Deleting equipment

Equipment with no accession number can be deleted from the database.

Precondition

The accession number is not set.

Procedure

1. Find and select the equipment in the **Equipment** class.
2. Select the method **Object / Delete equipment**.

The equipment is deleted from the database.

C.1.5 Entering a note for loan

You can enter notes on equipment for the purposes of loan.

Procedure

1. Find and select the equipment in the **Equipment** class.

2. Select the method **Object / Enter note for loan**.

The **Equipment note** window will open.

3. Enter the note.

C.1.6 Searching equipment

You can search for the equipment based on entered search requests in the equipment search window. The results have different colours. The colours represent different states of availability for loan, as follows:

- green – equipment is intended for outside loan,
- orange – equipment is intended for reading room loan,
- blue – damaged equipment,
- red – equipment is on loan
- grey – equipment does not have a set accession number or it has the status 2 – *in process*, 4 – *misplaced* or 5 – *lost*,
- black – de-accessioned equipment.

For the purposes of colour classification the search window offers the search attribute "Colour symbol for loan": 1 (green), 2 (orange), 3 (blue), 4 (red), 5 (grey), 6 (black).

C.1.7 Editing data on entered equipment

Group symbol, name, sublocation (d\l), accession number (f) and status cannot be changed for equipment that is on loan.

C.2 ENTERED EQUIPMENT

All procedures for entering equipment (loan, loan renewal, etc.) for the selected member are performed in the **Entered equipment** window. From the **Entered equipment** window you can access the local catalogue for equipment where you can check the availability of the equipment and perform equipment loan for the member.

Subchapters:

- Selecting a member
- Entered equipment editor
- Outside loan of equipment
- Reading room loan of equipment
- Returning equipment
- Loan renewal
- Changing the due date

C.2.1 Selecting a member

To access the **Entered equipment** window:

Procedure

1. Highlight the **Member** class and select the **Class / Entered equipment** method.
2. The **Search by key** window will open.
3. You can search for a member in two different ways:
 - by identifying the library member through the membership card number

Type in or use the reader to enter the membership card number in the **Search by key** window. You can also enter the alternative membership card number (e.g. student card number). In this case, all alternative numbers for the members must be entered previously.

- by using some other type of data

In the **Search by key** window, leave the entry field blank and click the **OK** button. The member search window will open, which you can use to search for the member (e.g. by surname and name).

4. You can also access the member search window, if the number you entered does not exist in the members' records.

**Tip:**

If the member is already on the workspace, use the mouse to highlight them and then use the **Entered equipment** method from the shortcut menu.

**Note:**


*When selecting a member for accessing the **Entered equipment** window, the software controls are not performed. This means that no special warnings are displayed if the member has restrictions like Entry denied, Outside loan not permitted, Membership card retained, etc. or if the member has entered debts. If the library has a stricter regime of controls for member visits, we recommend that you access the **Entered equipment** window from the **Home library material** window where the restriction controls for the member are performed.*

C.2.2 Entered equipment editor

The following member details are displayed in the top part of the **Entered equipment** window:

- membership card number
- member's name and surname
- member category

**Tip:**

You can transfer to the **Entered equipment** editor from the **Home library material** window by clicking the **Entered equipment**  icon. If the member has at least one entered equipment item, the number of equipment items is displayed in red. If the member has no loaned equipment items, the number zero (0) is displayed in black.

In the centre of the **Entered equipment** window the equipment entered for the member is displayed. In a library with departments a list of equipment, which is entered in the login department, is displayed for the member.

**Tip:**

In a library with departments you can see the equipment which is entered for the member in other departments by finding the member and clicking the **Entered equipment** folder in the related objects. A table containing the entered equipment will open. You can sort the equipment by departments by clicking "Department".

**Tip:**

If you wish to enter an equipment transaction for the member in a library with departments (e.g. to put equipment on loan) in another department, it is possible to change the login department by clicking the **Department** button in the **Entered equipment** window.

The data on individual equipment items is displayed in one row on the list of equipment and is divided into the following columns:

1st column

- current number
- equipment note

**Tip:**

If there is a note mark in the form of /*op* (e.g. 3/*op*) in the 1st column behind the current number of the equipment item, this means that the given equipment item (in this case, the 3rd) has an entered note for loan. To display the equipment note double click the note mark in the **Equipment note** window. The data on the time of entry and the author is also displayed next to the content of the note. You can enter and edit the note in the **Entered equipment** window or with the method **Equipment / Enter note for loan** (see chapter 2.5).

2nd column

- the equipment status, which can be one of the following:
 - *C(irculate)* – the item is on outside loan
 - *S(tudy room)* – the item is on loan in the reading room

3rd column

- identification number

The accession number is displayed next to entered equipment items.

4th column

- description

The data on the group symbol, name and second name is displayed next to the entered equipment item.

5th column

- call number

The call number with the data on sublocation, shelving location, storage area and short name is displayed next to the entered equipment item.

6th column

- date of equipment loan (for outside loan and reading room loan)
- date of loan renewal behind the first slash
- date of the last change of due date behind the second slash

7th column

- due date

8th column

- number of days of delay



Note:

*If the due date is older than today's date, the number of days of delay is displayed in red. The number of days of delay is displayed for all days by default. When calculating the number of days of delay, only workdays are taken into account if the library has this set in the display of delay days in the **Home library material** window.*

Procedures

The following procedures can be performed with the buttons in the **Entered equipment** window:

Catalogue – accessing the local catalogue of equipment, where you can search for, view and select equipment for loan from the local database

Lend – loaning the equipment for outside loan if the **Outside loan** option is selected in the drop-down list, or reading room loan if the **Reading room loan** option is selected; in the "Accession number:" field enter the identification number of the equipment (accession number)

Return – returning the equipment from outside loan or from the reading room; before clicking the button, enter the equipment identification number (accession number) under "Accession number:" or highlight the equipment on the list

Renew – renewing the loan period; before clicking the button, highlight the equipment on the list

Department – changing the library department where equipment transactions are being performed

Lending form – printing lending form with the list of equipment entered for the member



Note:

The printing of the equipment lending form includes entered equipment from all library departments (this applies for libraries with departments if the member has recorded equipment in different departments at the same time).

**Tip:**

If you would like to select the equipment in the table in the **Entered equipment** window in order to process it further, highlight it with the mouse. If you would like to de-select it, hold the <Ctrl> key and click the equipment item with the mouse.

C.2.3 Outside loan of equipment

There are two ways for putting equipment on outside loan for a member:

- enter the identification number of the equipment (accession number) under "Accession number:"
- find the equipment in the catalogue and then select it from the list of found equipment items

**Note:**

*For outside loan, check if the **Outside loan** is selected on the drop-down list before you click the **Lend** button.*

The equipment item will be added to the member's list of equipment. The loan period expiry date is calculated automatically based on the loan period specified for this type of material in the equipment (see chapter C.2.1).

**Note:**

When defining the loan period expiry date, the library's calendar is taken into account, which means that the loan period cannot expire on a day when the library is closed. In such a case, the loan period expiry date is set to the first upcoming workday.

**Note:**

In libraries with departments, the calendar of the login department is taken into account if different calendars are defined for individual departments.

Preconditions

If the equipment has any restrictions that might restrict or disable the loan, an appropriate warning message will be displayed. In the following cases you can decide if you wish to put the equipment on loan despite the restrictions:

- the attribute value "For reading room" is set for the equipment with the checkbox, which restricts outside loan, but not reading room loan
- the equipment has "Status" specified, which restricts loan; this applies to the status 3 – *damaged*

The equipment **cannot be put on loan** in the following cases:

- the identification number of the equipment does not exist
- the equipment does not belong to the department, where you would like

to put it on loan (applies to libraries, where the loan is organized by departments)

- the equipment is already entered as on loan
- the library does not allow the equipment to be put on loan (loan time is not specified for the equipment or is specified with the value *0d*)
- the equipment has a status that restricts loan; this applies to statuses 2 – *in process*, 4 – *misplaced*, 5 – *lost* and 6 – *de-accessioned*



Note:

*If you access the **Entered equipment** window with the method **Member / Entered equipment**, the software controls are not performed and special warnings are not displayed if the member has restrictions, like Entry denied, Outside loan not permitted, Membership card retained etc., or if the member has illicit debts for example. If the library has a stricter regime for these controls, we recommend that you access the **Entered equipment** window from the **Home library material** window where the controls are performed.*

C.2.3.1 Lending by entering the equipment's ID number

If the equipment you intend to put on loan is in front of you, record the loan by entering the equipment's identification number:

Procedure

1. Enter the equipment's accession number under "Accession number:" manually or by using a reader.
2. Check if the **Outside loan** option is selected in the drop-down list.
Confirm the entry by clicking the **Lend** button.



Note:

*If your reader is set up to automatically confirm the entry, activate the **Lend** button before entering the accession number.*

C.2.3.2 Loan with selection from catalogue

If a member has not yet looked for the equipment they want to borrow, you can help them by finding and selecting the equipment from the catalogue.

Procedure

1. In the **Entered equipment** window select the loan type **Outside loan** or **Reading room loan** from the drop-down list.
2. Click the **Catalogue** button.
The **Catalogue** window will open. It is divided into two parts: the upper part with search fields and the bottom part for displaying search results.
3. Enter your search term in the selected search fields and click the **Find** button.

If your search is successful, the number of found objects and a list of those objects will be displayed. The equipment is shown in one line, and the columns display the data on the equipment, like the default display of equipment data in the equipment search window.



Note:

In libraries with departments searching for equipment is restricted to the department in which you are currently logged in. This restriction can be changed by selecting a specific department in the "Department" attribute or by searching for equipment in all departments (delete the department data from the field).

In the "Status" attribute there are two default values that enable equipment loan. If you want to see all equipment items in the catalogue or the equipment items with other statuses, you need to enter the appropriate status in the field or delete all statuses.

By default, equipment results are displayed in the catalogue according to the "Colour symbol for loan" attribute. This attribute determines the preferred order for equipment loan. The colours are classified in the following order: green, orange, blue, red, grey, black (see chapter C.1.6). By default, the catalogue only shows the equipment that can be put on loan.



Tip:

In the catalogue, you can edit the display of search results according to your requirements or prepare various queries that you often use. You can prepare the display of search results in the **Equipment** class.

If you would like to see which member has entered equipment (equipment shown in red), select them from the results list and click the **Show** button. You see the member with entered equipment in the related objects of the equipment viewer.

4. Select the equipment and click the **Lend** button.

C.2.4 Reading room loan of equipment

Reading room loan procedure for equipment is the same as the outside loan procedure. You can lend equipment for the reading room to the member in two ways:

- enter the item's identification number (accession number) under "Accession number:"
- find the equipment in the catalogue and then select it from the results list

Before you click the **Lend** button, check if the **Reading room loan** is selected from the drop-down list. The equipment item is added to the list of equipment

for the member and has the status *S*. The equipment is normally put on reading room loan for one day only, which is why the due date is the same as the date of loan.



Note:

If there are restrictions that condition or prohibit the loan of the equipment, an appropriate warning will be displayed. You can decide to loan the equipment despite the restrictions if the equipment has a status that only allows loans to the reading room; this applies to the status 3 – damaged.

The equipment **cannot be put on loan** (not even to the reading room) in the following cases:

- the equipment's identification number does not exist
- the equipment does not belong to the department in which you wish to put it on loan (this applies to libraries where loan is organized by departments)
- the equipment is already entered as on loan
- the equipment has a status that restricts the loan; this applies to the following statuses: 2 – *in process*, 4 – *misplaced*, 5 – *lost* and 6 – *de-accessioned*

C.2.5 Returning equipment

Returning equipment refers to the equipment which has been put on outside or reading room loan (equipment with status *C* or *S*).

The equipment can be deleted from the member's list of equipment in several ways:

- without selecting the member, by entering the equipment's identification number (accession number)
- in the **Entered equipment** window, by entering the equipment's identification number
- in the **Entered equipment** window by selecting the equipment from the list



Note:

In libraries with departments you can only return the equipment that was loaned in the login department.

C.2.5.1 Returning equipment without selecting the member

When you wish to return the equipment quickly without selecting the member (e.g. in the case of returning a larger quantity of equipment that was borrowed

by different members), you can select the option of returning the material without member selection.

Precondition

Returning the equipment without selecting the member in libraries with departments is only possible in the department where the equipment was put on loan.

Procedure

1. Highlight the **Unavailable equipment** class.
2. Select the **Class / Return, delete** method.

The **Search by key** window will open. Use it to type in the identification number (accession number) or enter it by using the reader for the equipment that you wish to remove from the list of entered equipment for the member.

3. If necessary (depending on how the reader is set up), confirm the entry by clicking the **OK** button.

The **Entered equipment** window will open for the member that has this equipment item entered. The equipment item whose identification number you entered is already selected, the **Return** button is active, so you can confirm the return of the material by pressing the <Return> key.

After you confirm it, the **Entered equipment** window stays open and you need to close it with the **Close** button. Then the **Search by key** window will open again, where you can enter the identification number of the next equipment item to be returned. You can exit the window by clicking the **Cancel** button.

Options

If you wish to check or enter any other items for the member, highlight the member that was loaded to the workspace and use the **Entered equipment**, **Home library material** or **Edit** method.

C.2.5.2 Returning equipment with member selection

The return or deletion of equipment from the member's equipment records can also be entered in the **Entered equipment** window. The equipment can be returned by entering its identification number or by selecting it from the list.

C.2.5.2.1 Returning by entering the equipment's ID number

Procedure

1. Highlight the **Member** class and select the **Class / Entered equipment** method.

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

2. Select the member.

The member can be found by using the library membership card number or by using some other type of data (see chapter 4.1).

The **Entered equipment** window will open.

3. Under "Accession number", type in the equipment's identification number or enter it by using the reader.
4. To confirm the entry, click the **Return** button.
The item will be removed from the member's list of equipment.



Note:

*If your reader is set up to automatically confirm the entry, activate the **Return** button before entering the accession number.*

C.2.5.2.2 Returning equipment by selecting it from a list

You can also remove the equipment from the member's records by selecting it from the list of equipment entered for the member.

Procedure

1. Highlight the equipment.
2. Return the highlighted equipment by clicking the **Return** button.

C.2.6 Loan renewal

Loan renewals for outside loans of the equipment can be performed in the **Entered equipment** window. First, you have to find the member for whom you wish to renew the loan period. You cannot use this method of renewing the loan period for equipment put on reading room loan, but you can change the expiry date manually (see chapter C.2.7).

Procedure

1. Highlight the **Member** class and select the **Class / Entered equipment** method.

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

2. Select the member.

You can find the member by using the library membership card number or some other data (see the *COBISS3/Loan* manual, chapter 4.1).

The **Entered equipment** window will open.

3. In the **Entered equipment** window, highlight the equipment for which you wish to renew the loan period.
4. Click the **Renew** button.

The new due date for the highlighted equipment is calculated on the basis of the renewal period, and the current date is taken into account as the start date. The current date is also entered as the date of renewal.



Note:

When defining a new loan period expiry date, the library's calendar will be taken into account, so the loan period cannot expire on the day when the library is closed (see chapter 2.2). In this case, the first following workday is defined as the due date.

Preconditions

In case of loan period restrictions for the member or the material, a warning message will appear. You can decide to renew the loan despite restrictions in the following cases:

- the checkbox in the "For reading room" attribute is set for the equipment or a status that also conditions outside loan (see chapter C.2.3); this applies to the equipment status 3 – *damaged*
- loan period is expired

The ***loan cannot be renewed*** for the equipment in the following cases:

- the library does not allow loan renewal for the equipment (the equipment has the value *0d* set in the "Loan renewal period" attribute or the period is not specified at all)
- the equipment has a specified status that does not allow loan (see chapter C.2.3); this applies to the equipment with the following statuses: 2 – *in process*, 4 – *misplaced*, 5 – *lost* and 6 – *de-accessioned*
- the newly defined loan period due date would be older than the previously defined one

C.2.7 Changing the due date

In case of special treatment of specific equipment or a specific library member, you can set up a new due date that is different to the one normally calculated based on the time parameters for that type of equipment. First, put the equipment on loan. The loan period will be set up based on the time parameters for this type of equipment. You can change the due date as required. The procedure can only be performed in the **Entered equipment** window. You first need to find the member who wants to renew the loan period.

Procedure

1. Highlight the **Member** class and select the **Class / Entered equipment** method.
The **Search by key** window will open.
2. Select the member.
Find the member by using the library membership card number or some other data (see chapter 4.1).
The **Entered equipment** window will open.
3. Highlight the due date that you wish to change.

Double-click the due date (7th column Due date) for the item in the list of equipment and overwrite the old due date with the new one, and confirm the date by clicking inside of the table.

If you wish to extend the due date for any number of days (*d*), weeks (*w*), months (*m*) or years (*y*), delete the calculated due date and then enter the number and symbol of the period (e.g. *3m* for 3 months) in place of the date.

4. The current date is entered as the date of the last change of the due date.



Note:

The new due date you enter must be more recent than the current date.



Note:

When changing the due date manually, the loan period restrictions for the member or item will not be checked.

C.3 EQUIPMENT TRANSACTIONS

Transactions with equipment are entered in a separate **Equipment transactions** class and are not combined with other loan transactions.

You can create different queries for individual transactions or a group of transactions in the **Equipment transactions** search window. If necessary, the search results can be transferred into the Excel software for further processing.

For the purposes of creating statistical reports (e.g. of active members, visits, etc.) and other reports for the COBISS3/Loan software module each equipment transaction for the member also includes the transaction *35 – member activity with equipment*.

D STATISTICAL DATA FOR THE BIBSIST (NUK – CEZAR) QUESTIONNAIRE

This appendix describes the statistical reports for loan that comply with the data from the BibSiSt questionnaire. This questionnaire is filled by libraries every year as a part of the statistical measurements of the Centre for Library Development in Slovenia (NUK – CeZaR).

The statistical reports are created and printed in the COBISS3/Reports software module. The report form is predefined, and the report content can be changed by entering individual parameters when creating the report.

Report definitions are divided into four groups, based on the library type, as follows:

- school libraries
- university libraries
- special libraries
- public libraries

In each group, two statistical reports are prepared, one for library members and one for loan of material. The statistical report for library members is created based on the data in the **Transactions** class and its related **Member** class. The statistical report for loan of material is created based on the data in the **Transactions** class.

Each statistical report has its designation and name. The statistical report designation comprises the software module designation (LOAN), the designation indication that report belongs to the group of statistical data for the BiBSiSt questionnaire (BiBSiSt) and the running number of the report; all elements are linked together with the " - " sign.

To enter the data in the BiBSiSt questionnaire, which is based on a typical work week, the Unavailable material / Specifying a typical work week method. Once the procedure is completed, the data for the calculation of a typical work week for loan and the information, which week is typical for loan, is displayed in the Specifying a typical work week window. Next, the data for the calculation of a typical work week for visits and the information, which week is typical for visits, is displayed.

D.1 LIST OF REPORTS

The list of reports is in the **Reports / Standard / BibSiSt (NUK – CeZaR)** folder:

- School libraries
 - LOAN-BibSiSt-01: Library members
This is the data for item 3.1.1 in the BibSiSt questionnaire.
 - LOAN-BibSiSt-02: Loan of material
This is the data for item 3.2.1 in the BibSiSt questionnaire.
- University libraries
 - LOAN-BibSiSt-11: Library members
This is the data for item 3.1.1 in the BibSiSt questionnaire.
 - LOAN-BibSiSt-12: Loan of material
This is the data for items 3.2.2 and 3.2.6 in the BibSiSt questionnaire.
- Special libraries
 - LOAN-BibSiSt-21: Library members
This is the data for item 3.1.1 in the BibSiSt questionnaire.
 - LOAN-BibSiSt-22: Loan of material
This is the data for items 3.2.2 and 3.2.6 in the BibSiSt questionnaire.
- Public libraries
 - LOAN-BibSiSt-31: Library members
This is the data for item 3.1.1 in the BibSiSt questionnaire.
 - LOAN-BibSiSt-32: Loan of material
This is the data for items 3.2.2 and 3.2.5 in the BibSiSt questionnaire.

D.2 ENTERING INPUT PARAMETERS FOR REPORT CREATION

You specify the criteria for data selection in the **Enter parameters for report creation** window.

D.2.1 Statistics LOAN-BibSiSt-01, LOAN-BibSiSt-11, LOAN-BibSiSt-21 and LOAN-BibSiSt-31

When creating statistical reports specify the values of the following parameters:

- "Period"

Specify the period that should be considered when creating the statistical report of active members.

Parameter entry is mandatory.

- "Transaction"

Select the transactions (member activities) that should be taken into account in the statistical report of active members.

The following transactions are selected by default: *member registration, updating temporary note about the material, outside loan, reading room loan, reserving currently unavailable material, reserving available material, loan renewal, return/delete material from member's records, return with restriction, entering loss of material, change of member data, copy de-accessioning, change of due date, start of routing, visit by member (internet access), reading room reservation, renewal via telephone, end of routing, payment entry, visit by member (reading room), member activity with equipment, interlibrary loan, interlibrary return, online registration, change of data via COBISS+ and mCOBISS, change of number, reserving currently unavailable material via COBISS+ and mCOBISS, reserving available material via COBISS+ and mCOBISS, renewal via COBISS+ and mCOBISS, cancellation of reservation via COBISS+ and mCOBISS, visit by member – miscellaneous*

Parameter entry is mandatory. If no transaction is selected, all transaction will be considered when creating the statistical report.

D.2.2 Statistics LOAN-BibSiSt-02, LOAN-BibSiSt-12, LOAN-BibSiSt-22 and LOAN-BibSiSt-32

When creating statistical reports specify the values of the following parameter:

- "Period"

Specify the period for which the data should be considered in the statistical report.

Parameter entry is mandatory.

D.3 DESCRIPTION OF INDIVIDUAL STATISTICS

D.3.1 Statistics in the group School libraries

D.3.1.1 LOAN-BibSiSt-01: Library members

The report shows the data on the number of active members for selected activities for the selected period (for item 3.1.1 in the BibSiSt questionnaire).

In the table **ACTIVE USERS BY MEMBER CATEGORY**, the data is arranged vertically by member category. Under *pupils*, members with the categories 001 – pre-school children, 002 – primary school pupils and 003 – secondary school pupils are considered. Under *others*, members from all other categories are considered. The summary data is displayed in the *total* row.

In the table **ACTIVE MEMBERS IN RESPECT TO MEMBERS GROUP**, the data is arranged vertically by the "Members group"¹ attribute. The summary data is displayed in the *total* row.

For display by categories, the classification *member category_BibSiSt_5* (*pupils/others*) is used, and for the display based on the members group the classification *members group_BibSiSt_1* (*dynamic*) is used.

D.3.1.2 LOAN-BibSiSt-02: Loan of material

The report shows the data on the number of loan transactions for the selected period (for item 3.2.1 in the BibSist questionnaire).

In the table **LOAN (accessioned units)**, the data is shown on the number of loans, where the following transactions are considered: 11 – outside loan, 12 – reading room loan, 16 – loan renewal, 26 – renewal via telephone, 21 – change of due date, 66 – renewal via COBISS+ and mCOBISS. The classification *transaction type_BibSiSt_5* (*loan*) is used.

Horizontally, the data is arranged by type of material in loan. Among *books and brochures*, the types of material 01 – books and 11 – books – fiction are counted, among *serials*, the types of material 02 – serials and 12 – integrating resources; the types of material from 03 to 10 and from 13 and 40 are counted as *non-book material*. This is followed by the summary column for all types of

¹ In June 2018, in COBISS3 in the **Member / Membership** editor, the attribute "Members group" was added, which allows the classification of a member to the selected group (e.g. for the purposes of accessing information resources, creating various lists and statistical reports, etc.). The members groups must first be entered in the local code list **Members group (CODE 328)**.

material. The criteria for classification by types of material are specified with the classification *type of material in loan_BibSiSt_1 (books and brochures, serials, non-book material)*.

In the first table, e-book loan transactions are not included.

Additionally, under the first table there is data on the number of loan period renewals for outside loan (total), where the following transactions are considered: 16 – loan renewal, 26 – renewal via telephone, 21 – change of due date and 66 – renewal via COBISS+ and mCOBISS.

In the table **ELECTRONIC AND AUTOMATED MATERIAL LOAN SERVICES**, the data is shown on the number of reservations of available material via COBISS+ and mCOBISS (transaction 64), on the number of reservations of currently unavailable material via COBISS+ and mCOBISS (transaction 63), on the number of renewals via automated phone service (transaction 26). The criteria for classification are specified with the classification *transaction type_BibSiSt_3 (reservations, renewals)*.

In the table **USE OF ELECTRONIC RESOURCES**, the number of loans of e-books, recorded in the COBISS system, is shown (i.e. the number of e-book loans, automatically entered into the COBISS system from the Biblos portal). The transactions 11 – outside loan, performed with the username *_EBOOKS* (for transactions in COBISS2/Loan) and the username *EBookService* (for transactions in COBISS3/Loan) are considered.

D.3.2 Statistics in the group University libraries

D.3.2.1 LOAN-BibSiSt-11: Library members

The report shows the data on the number of active members for selected activities for the selected period (for item 3.1.1 in the BibSiSt questionnaire).

In the table **ACTIVE USERS BY MEMBER CATEGORY**, the data is shown vertically by member categories. Under *higher education lecturers and staff, researchers*, the members with categories 014 – employees at parent institution and 015 – employees at university are considered; under *others*, the members of all other categories are considered. The summary data is displayed in the *total* row.

In the table **ACTIVE MEMBERS IN RESPECT TO MEMBERS GROUP**, the data is displayed vertically by the "Members group"² attribute. The summary data is displayed in the *total* row.

The data on the number of members with the category 125 – legal entities – ext. institutions is displayed in a separate table.

² In June 2018, in COBISS3 in the **Member / Membership** editor, the attribute "Members group" was added, which allows the classification of a member to the selected group (e.g. for the purposes of accessing information resources, creating various lists and statistical reports, etc.). The members groups must first be entered in the local code list **Members group (CODE 328)**.

The criteria for classification are specified with the classification *member category_BibSiSt_4* (*lecturers, staff/students/others*); the classification used for the display based on members group is *members group_BibSiSt_1* (*dynamic*). For the display of legal entities, the classification *member category_BibSiSt_3* (*legal entities*) is used.

D.3.2.2 LOAN-BibSiSt-12: Loan of material

The report shows the data on the number of loan transactions for the selected period (for items 3.2.1 and 3.2.6 in the BibSist questionnaire).

In the table **OUTSIDE LOAN AND LIBRARY LOAN (physical units)** the data is shown on the number of loans (*outside loan or to the workplace*), where the following transactions are considered: 11 – outside loan, 16 – loan renewal, 26 – renewal via telephone, 21 – change of due date, 66 – renewal via COBISS+ and mCOBISS and 22 – start of routing, as well as the number of loans *to the library*, where the transaction 12 – reading room loan is considered. The classification *transaction type_BibSiSt_2* (*outside loan or to the workplace, to the library*) is used.

Horizontally, the data is arranged by type of material in loan. Among *books, brochures, undergraduate and master's theses, dissertations, serials, non-book material*, the types of material 01 – books and 11 – books – fiction are counted, among *serials*, the types of material 02 – serials and 12 – integrating resources; the types of material from 03 to 10 and from 13 and 40 are counted as *non-book material*. This is followed by the summary column for all types of material. The criteria for classification by types of material are specified with the classification *type of material in loan_BibSiSt_2* (*books, brochures, undergraduate and master's theses, dissertations, serials, non-book material*).

In the first table, e-book loan transactions are not included.

Additionally, under the first table there is data on the number of loan period renewals for outside loan (total), where the following transactions are considered: 16 – loan renewal, 26 – renewal via telephone, 21 – change of due date and 66 – renewal via COBISS+ and mCOBISS.

In the table **ELECTRONIC AND AUTOMATED MATERIAL LOAN SERVICES**, the data is shown on the number of reservations of available material via COBISS+ and mCOBISS (transaction 64), on the number of reservations of currently unavailable material via COBISS+ and mCOBISS (transaction 63), the number of renewals via COBISS+ and mCOBISS (transaction 66), and on the number of renewals via automated phone service (transaction 26). The criteria for classification are specified with the classification *transaction type_BibSiSt_3* (*reservations, renewals*).

In the table **SELF-CHECKOUT**, the transactions performed with the username *sip** are considered. The *number of loans at self-checkout* is displayed, where the transactions 11 – outside loan and 16 – loan renewal are considered, as well as the *number of returns at self-checkout*, where the transaction 17 – return/delete material from member's records is considered. The criteria for classification are specified with the classification *transaction type_BibSiSt_4* (*loan, return at self-checkout*).

In the table **USE OF ELECTRONIC RESOURCES**, the number of loans of e-books, recorded in the COBISS system, is shown (i.e. the number of e-book loans, automatically entered into the COBISS system from the Biblos portal). The transactions 11 – outside loan, performed with the username *_EBOOKS* (for transactions in COBISS2/Loan) and the username *EBookService* (for transactions in COBISS3/Loan) are considered.

D.3.3 Statistics in the group Special libraries

D.3.3.1 LOAN-BibSiSt-21: Library members

The report shows the data on the number of active members for selected activities for the selected period (for item 3.1.1 in the BibSiSt questionnaire).

In the table **ACTIVE USERS BY MEMBER CATEGORY**, the data is shown vertically by member categories. Under *employees at parent institution*, the members with the category 014 – employees at parent institution are considered; under *others*, the members of all other categories are considered. The summary data is displayed in the *total* row.

In the table **ACTIVE MEMBERS IN RESPECT TO MEMBERS GROUP**, the data is displayed vertically by the "Members group"³ attribute. The summary data is displayed in the *total* row.

The data on the number of members with the category 125 – legal entities – ext. institutions is displayed in a separate table.

The criteria for classification are specified with the classification *member category_BibSiSt_2* (*employees at institution/others*); the classification used for the display based on members group is *members group_BibSiSt_1* (*dynamic*). For the display of legal entities, the classification *member category_BibSiSt_3* (*legal entities*) is used.

D.3.3.2 LOAN-BibSiSt-22: Loan of material

The report shows the data on the number of loan transactions for the selected period (for items 3.2.2 and 3.2.6 in the BibSist questionnaire).

In the table **OUTSIDE LOAN AND LIBRARY LOAN (physical units)** the data is shown on the number of loans (*outside loan or to the workplace*), where the following transactions are considered: 11 – outside loan, 16 – loan renewal, 26 – renewal via telephone, 21 – change of due date, 66 – renewal via COBISS+ and mCOBISS and 22 – start of routing, as well as the number of

³ In June 2018, in COBISS3 in the **Member / Membership** editor, the attribute "Members group" was added, which allows the classification of a member to the selected group (e.g. for the purposes of accessing information resources, creating various lists and statistical reports, etc.). The members groups must first be entered in the local code list **Members group (CODE 328)**.

loans *to the library*, where the transaction 12 – reading room loan is considered. The classification *transaction type_BibSiSt_2 (outside loan or to the workplace, to the library)* is used.

Horizontally, the data is arranged by type of material in loan. Among *books, brochures, undergraduate and master's theses, dissertations, serials, non-book material*, the types of material 01 – books and 11 – books – fiction are counted, among *serials*, the types of material 02 – serials and 12 – integrating resources; the types of material from 03 to 10 and from 13 and 40 are counted as *non-book material*. This is followed by the summary column for all types of material. The criteria for classification by types of material are specified with the classification *type of material in loan_BibSiSt_2 (books, brochures, undergraduate and master's theses, dissertations, serials, non-book material)*.

In the first table, e-book loan transactions are not included.

Additionally, under the first table there is data on the number of loan period renewals for outside loan (total), where the following transactions are considered: 16 – loan renewal, 26 – renewal via telephone, 21 – change of due date and 66 – renewal via COBISS+ and mCOBISS.

In the table **ELECTRONIC AND AUTOMATED MATERIAL LOAN SERVICES**, the data is shown on the number of reservations of available material via COBISS+ and mCOBISS (transaction 64), on the number of reservations of currently unavailable material via COBISS+ and mCOBISS (transaction 63), the number of renewals via COBISS+ and mCOBISS (transaction 66), and on the number of renewals via automated phone service (transaction 26). The criteria for classification are specified with the classification *transaction type_BibSiSt_3 (reservations, renewals)*.

In the table **SELF-CHECKOUT**, the transactions performed with the username *sip** are considered. The *number of loans at self-checkout* is displayed, where the transactions 11 – outside loan and 16 – loan renewal are considered, as well as the *number of returns at self-checkout*, where the transaction 17 – return/delete material from member's records is considered. The criteria for classification are specified with the classification *transaction type_BibSiSt_4 (loan, return at self-checkout)*.

In the table **USE OF ELECTRONIC RESOURCES**, the number of loans of e-books, recorded in the COBISS system, is shown (i.e. the number of e-book loans, automatically entered into the COBISS system from the Biblos portal). The transactions 11 – outside loan, performed with the username *_EBOOKS* (for transactions in COBISS2/Loan) and the username *EBookService* (for transactions in COBISS3/Loan) are considered.

D.3.4 Statistics in the group Public libraries

D.3.4.1 LOAN-BibSiSt-31: Library members

The report shows the data on the number of active members for selected activities for the selected period (for item 3.1.1 in the BibSiSt questionnaire).

In the table **ACTIVE USERS BY AGE BY YEAR OF BIRTH**, under *youth under 15*, members with their year of birth between 2004 and 2018 are considered, whereas under *adults*, members with their year of birth up to and including 2003 are considered. Members, for which there is no year of birth entered, are displayed in the *empty value* category. The summary data is displayed in the *total* row.

Libraries that do not collect the data on their library members year of birth, use the table **ACTIVE USERS BY AGE BY CATEGORY**. In this table, under *youth under 15*, members with the categories 001 – pre-school children and 002 – primary school children are considered, whereas under *adults*, the members from all other categories are considered. The summary data is displayed in the *total* row.

For display by year of birth, the classification *member age_BibSiSt_1* (*youth under 15/adults depending on their year of birth*) is used; for display by categories, the classification *member category_BibSiSt_1* (*youth under 15/adults*) is used. For display of legal entities, the classification *member category_BibSiSt_3* (*legal entities*) is used.

D.3.4.2 LOAN-BibSiSt-32: Loan of material

The report shows the data on the number of loan transactions for the selected period (for items 3.2.2 and 3.2.5 in the BibSist questionnaire).

In the table **OUTSIDE LOAN AND LIBRARY LOAN (physical units)** the data is shown on the number of outside loans (*outside loan*), where the following transactions are considered: 11 – outside loan, 16 – loan renewal, 26 – renewal via telephone, 21 – change of due date, 66 – renewal via COBISS+ and mCOBISS and 22 – start of routing, as well as the number of loans *to the library*, where the transaction 12 – reading room loan is considered. The classification *transaction type_BibSiSt_1* (*outside loan, to the library*) is used.

Horizontally, the data is arranged by type of material in loan. Among *books and brochures*, the types of material 01 – books and 11 – books – fiction are counted, among *serials*, the types of material 02 – serials and 12 – integrating resources; the types of material from 03 to 10 and from 13 and 40 are counted as *non-book material*. This is followed by the summary column for all types of material. The criteria for classification by types of material are specified with the classification *type of material in loan_BibSiSt_1* (*books and brochures, serials, non-book material*).

In the first table, e-book loan transactions are not included.

In the table **OUTSIDE LOAN (physical units)**, the following transactions are considered: 11 – outside loan, 16 – loan renewal, 26 – renewal via telephone, 21 – change of due date, 66 – renewal via COBISS+ and mCOBISS and 22 – start of routing. Vertically, the data is shown on the number of outside loans for the UDC group 82 – fiction in subfield 675s; under *other*, the remaining UDC groups are shown, under *empty value*, the number of loans of material without

a specified UDC group is shown. The classification *UDC 675s_BibSiSt_1* (82, *other*) is used.

Horizontally, the data is sorted by intended purpose. Among *youth*, material with codes a, b, c, d or e in subfield 100e – Intended purpose is listed; among *adults*, the material with the codes k, m or empty. This is followed by the summary column for both types of intended purpose. The criteria for classification by types of material are specified with the classification *intended purpose_BibSiSt_1* (*youth/adults depending on 100e*).

In the second table, e-book loan transactions are also not included.

Additionally, under the first table there is data on the number of loan period renewals for outside loan (total), where the following transactions are considered: 16 – loan renewal, 26 – renewal via telephone, 21 – change of due date and 66 – renewal via COBISS+ and mCOBISS.

In the table **ELECTRONIC AND AUTOMATED MATERIAL LOAN SERVICES**, the data is shown on the number of reservations of available material via COBISS+ and mCOBISS (transaction 64), on the number of reservations of currently unavailable material via COBISS+ and mCOBISS (transaction 63), the number of renewals via COBISS+ and mCOBISS (transaction 66), and on the number of renewals via automated phone service (transaction 26). The criteria for classification are specified with the classification *transaction type_BibSiSt_3* (*reservations, renewals*).

In the table **SELF-CHECKOUT**, the transactions performed with the username *sip** are considered. The *number of loans at self-checkout* is displayed, where the transactions 11 – outside loan and 16 – loan renewal are considered, as well as the *number of returns at self-checkout*, where the transaction 17 – return/delete material from member's records is considered. The criteria for classification are specified with the classification *transaction type_BibSiSt_4* (*loan, return at self-checkout*).

In the table **USE OF ELECTRONIC RESOURCES**, the number of loans of e-books, recorded in the COBISS system, is shown (i.e. the number of e-book loans, automatically entered into the COBISS system from the Biblos portal). The transactions 11 – outside loan, performed with the username *_EBOOKS* (for transactions in COBISS2/Loan) and the username *EBookService* (for transactions in COBISS3/Loan) are considered.

D.4 CLASSIFICATIONS FOR LOAN

Classification	Description	Category	Use
member age_BibSiSt_1 (youth under 15/adults depending on their year of birth)	age groups by year of birth	<ul style="list-style-type: none"> <i>youth under 15</i> – 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019 <i>other – adults</i> <i>empty value</i> <i>y<a<all</i> – total 	LOAN-BibSiSt-31
member age_BibSiSt_1 (youth under 15/adults)	member category – classification: youth, adults	<ul style="list-style-type: none"> <i>youth</i> – 001, 002 <i>other – adults</i> <i>all</i> – total 	LOAN-BibSiSt-31
member category_BibSiSt_2 (employees at institution/others)	member category – classification: employees at institution/others	<ul style="list-style-type: none"> <i>employees at parent institution</i> – 014 <i>other – others</i> <i>all</i> – total 	LOAN-BibSiSt-21
member category_BibSiSt_3 (legal entities)	member category – classification: legal entities	<ul style="list-style-type: none"> <i>legal entities – ext. institutions</i> – 125 	LOAN-BibSiSt-11, LOAN-BibSiSt-21
member category_BibSiSt_4 (lecturers, staff/students/others)	member category – classification: lecturers, staff, students, others	<ul style="list-style-type: none"> <i>higher education lecturers and staff, researchers</i> – 014, 015 <i>students</i> – 004, 005, 020 <i>other – others</i> <i>all</i> – total 	LOAN-BibSiSt-11
member category_BibSiSt_5 (pupils/others)	member category – classification: pupils, others	<ul style="list-style-type: none"> <i>pupils</i> – 001, 002, 003 <i>other – others</i> <i>all</i> – total 	LOAN-BibSiSt-01
members group_BibSiSt_1 (dynamic)	groups in respect to the "Member group" attribute	<ul style="list-style-type: none"> <i>dynamic</i> <i>empty value</i> <i>all</i> – total 	LOAN-BibSiSt-01, LOAN-BibSiSt-11, LOAN-BibSiSt-21
type of material in loan_BibSiSt_1 (books and brochures, serials, non-book material)	types of material in respect to the "Type of material" attribute	<ul style="list-style-type: none"> <i>books and brochures</i> – 01-books, 11-books – fiction <i>serials</i> – 02- serials, 12-integrating resources <i>non-book material</i> – from 03 to 10 and from 13 to 40 (cassettes, CD, videocassettes, floppy discs, CD-ROM, maps, printed and manuscript music, objects, cassettes – fiction, CD CD – fiction, videocassettes – fiction, floppy discs – fiction, CD-ROM – fiction, DVD-Audio, DVD-Audio – fiction, DVD-Video, comp. DVD, cassettes – music, CD – music, videocassettes – music, DVD-Video – fiction, CD-ROM – music, DVD-Audio – music, DVD-Video – music, comp. DVD – music, cassettes – entertainment, CD – entertainment, videocassettes – entertainment, floppy discs – entertainment) <i>empty value</i> 	LOAN-BibSiSt-02, LOAN-BibSiSt-32

		<ul style="list-style-type: none"> • <i>all</i> – total 	
type of material in loan_BibSiSt_2 (books, brochures, undergraduate and master's theses, dissertations, serials, non-book material)	types of material in respect to the "Type of material" attribute	<ul style="list-style-type: none"> • <i>books, brochures, undergraduate and master's theses, dissertations</i> – 01-books, 11-books – fiction • <i>serials</i> – 02-serials, 12-integrating resources • <i>non-book material</i> – from 03 to 10 and from 13 to 40 (cassettes, CD, videocassettes, floppy discs, CD-ROM, maps, printed and manuscript music, objects, cassettes – fiction, CD CD – fiction, videocassettes – fiction, floppy discs – fiction, CD-ROM – fiction, DVD-Audio, DVD-Audio – fiction, DVD-Video, comp. DVD, cassettes – music, CD – music, videocassettes – music, DVD-Video – fiction, CD-ROM – music, DVD-Audio – music, DVD-Video – music, comp. DVD – music, cassettes – entertainment, CD – entertainment, videocassettes – entertainment, floppy discs – entertainment) • <i>empty value</i> • <i>all</i> – total 	LOAN-BibSiSt-12, LOAN-BibSiSt-22
transaction type_BibSiSt_1 (outside loan, to the library)	transactions in respect to the "Transaction designation" attribute	<ul style="list-style-type: none"> • <i>outside loan</i> – 11-outside loan, 16-loan renewal, 26-renewal via telephone, 21-change of due date, 66-renewal via COBISS+ and mCOBISS, 22-start of routing • <i>to the library</i> – 12-reading room loan • <i>all</i> – total 	LOAN-BibSiSt-32
transaction type_BibSiSt_2 (outside loan or to the workplace, to the library)	transactions in respect to the "Transaction designation" attribute	<ul style="list-style-type: none"> • <i>outside loan or to the workplace</i> – 11-outside loan, 16-loan renewal, 26-renewal via telephone, 21-change of due date, 66-renewal via COBISS+ and mCOBISS, 22-start of routing • <i>to the library</i> – 12-reading room loan • <i>all</i> – total 	LOAN-BibSiSt-12, LOAN-BibSiSt-22
transaction type_BibSiSt_3 (reservations, renewals)	transactions in respect to the "Transaction designation" attribute	<ul style="list-style-type: none"> • <i>64</i> – reserving available material via COBISS+ and mCOBISS • <i>63</i> – reserving currently unavailable material via COBISS+ and mCOBISS • <i>66</i> – renewal via COBISS+ and mCOBISS • <i>26</i> – renewal via telephone – automated phone service 	LOAN-BibSiSt-02, LOAN-BibSiSt-12, LOAN-BibSiSt-22, LOAN-BibSiSt-32
transaction type_BibSiSt_4 (loan, return at self-checkout)	transactions in respect to the "Transaction designation" attribute	<ul style="list-style-type: none"> • <i>self-checkout</i> – 11-outside loan, 16-loan renewal, • <i>return of material at self-checkout</i> – 17-return/delete material from member's records 	LOAN-BibSiSt-12, LOAN-BibSiSt-22, LOAN-BibSiSt-32
transaction type_BibSiSt_5 (loan)	transactions in respect to the "Transaction designation" attribute	<ul style="list-style-type: none"> • <i>loan</i> – 11-outside loan, 16-loan renewal, 26-renewal via telephone, 21-change of due date, 66-renewal 	LOAN-BibSiSt-02

		via COBISS+ and mCOBISS, 12-reading room loan	
UDC 675s_BibSiSt_1 (82, other)	types of material by UDC in 675s	<ul style="list-style-type: none"> • 82 – fiction • other • empty value • all – total 	LOAN-BibSiSt-32
intended purpose_BibSiSt_1 (youth/adults depending on 100e)	intended purpose in respect to 100e – Target audience code	<ul style="list-style-type: none"> • youth – a, b, c, d, e • adults – k, m, u, empty value • all – total 	LOAN-BibSiSt-32

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