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COBISS3 software

Loan updates description

V6.12-00(02), 27–28 June 2017

- Correction regarding the loan period renewal for material with an entered overdue notice.

V6.12-00(01), 20 June 2017

- Correction regarding the return of material using the **Unavailable material / Return, delete** method.

V6.12-00, 17–18 June 2017

- Searching in the **Keywords** field was updated in the search window of the **Member** class. It is now possible to search by the attributes **Name**, **Surname**, **Guardian/guarantor name** and **Notes**:
  - When entering search requests you can use diacritics or omit them (enter e.g. soncek or šonček); the search results are the same in both cases.
  - Word search was added (you can enter any punctuation mark or a space between two or more words; when searching, the words will be taken into account without any punctuation marks).
  - It is possible to truncate a search term or phrase using the "∗" sign (asterisk), which replaces any number of characters. The truncation sign can only be used at the end.
  - When entering a search request, you can use small or capital letters; the search result is the same.
  - The default logical operation between words in the search request is AND (the search results must contain all words from the search phrase).
- In libraries with activated use of RFID readers, the **Scan RFID** button was added for the purposes of scanning material when searching by key in the **Field 996/997** class and the **Unavailable material** class and for the methods **Unavailable material / Prepare reserved material for collection** and **Field 996/997 / Enter transaction with material in reading room**.
- In libraries that use RFID devices, their use can be activated in selected library departments only.
- The "Employment" search field was added in the search window of the **Member** class.
- Two additional search fields were added to the search window of the **Entered debts** class: "Services/debts" (enables searching debts by description) and "Type of service/debts" (enables selecting the debt type from the code list).
- The "Membership card number" search field was added in the search window of the **Invoice** class.

- Two additional search fields were added to the search window of the **Transactions** class: "Mobile library stop" and "Department".
- The **Material loan analysis** method was added in the **Unavailable material** class. It enables the preparation of data on the loan of monographs for titles, the copies of which are stored at the library; not included are copies with the status *"de-accessioned"*. The following transactions are taken into account as loan: outside loan, reading room loan, reading room transaction, loan period renewal, change of return date, loan period renewal by phone, My library renewal and interlibrary loan. After you select the method, enter the time period, for which you wish to perform the analysis. In the case of libraries with departments, you can select on or more departments, the material of which you wish to include in the analysis. Once the parameters are defined, the software requests the file location and name (the file type must be *.txt*, e.g. *department01.txt*) for the file in which you will save the data. Once the analysis procedure is finished, a message will be displayed. The file contains the following data on the material: record COBISS.SI-ID, title, author, accession date (for the first copy), accession numbers of individual copies of each title, call number (of the first copy) and number of loans. The data is then exported to MS Excel where you can sort it any way you like (e.g. by number of loans) and analyse it even further. By sorting the data by number of loans you will receive data on the number of titles with the most loans, but also data on titles that were not put on loan. The data on the number of loans is displayed by department for all copies of each title together.
- It is now possible to return material that was put on loan in another department to the mobile library without previously entering the transfer of this material to the mobile library.
- Once you process a reservation (**Unavailable material / Process reservations** method), the notification about the task with the information about where the report about the processed newly received reservations is stored is no longer sent to the e-mail address of the person who processed the reservation.
- The library can decide to include contents of the global list to an individual local code list (e.g. the contents of the global code list for the attribute *University in eVŠ* to the *Institutions, companies* code list). The transfer of the global code list contents to the local code list can be performed at IZUM upon the library's request.
- When renewing the loan period, for material with availability levels, for which unconditional or restricted loan is defined, the loan period is renewed for the time specified for each type of material in the time parameters table. The loan restrictions applicable to material without an availability level are also taken into account.
- The call number was added to the display of holdings data in loan (**View** button) that is displayed in the **Insight into the library material status** window.
- Access to the e-documents archive is now enabled also for usernames with basic privileges for working in loan.
- The option of de-activating the printout of a catalogue card with data on the reservation of material in the process of preparing reserved material for collection was added. To activate this parameter, the library must send a request to IZUM.
- Corrections regarding the display of search results when searching in the **Catalogue**:
  - in expert search, the selected department is taken into account in libraries with departments,
  - sorting volumes of serials from most recent to oldest also in the case when the search results include monographs and serials.
- On lending notes, invoices, credit notes and cancellations of invoices the library name and department name are now displayed in bold.

- On lending notes and invoices, the library can now display the lender's numeric identifier (the unique identifier of the username) instead of the lender's name and surname. To do this, replace the variable *lender's name and surname* with the value *lender's numeric identifier* for the type of data *4. Additional data on the lending form and invoice*.
  The numeric identifier is added to the **User** class attributes. The table of usernames with corresponding numeric identifiers is prepared on the *Training* portal (Users' list (tax numbers)).
- Correction regarding the addressing of overdue notices for underage library members.
- Correction regarding the display of the copy status and the reservation options in departments with non-automated loan.
- Correction regarding invoice cancellations for non-members.
- Reports for loan purposes:
  o The new report *LOAN-Mb-09: Active members* enables the creation of a list of active members in a selected time period. In the **Transactions** search window, specify the parameters for including members in the list of active members (time period, one or more transactions, member category, transaction department, etc.). It is also recommended to enter the "Comment in the title" parameter before creating the report. In the report, for each active member the data on the membership card number, name, surname, category, address and date of entry will be displayed. If some of the active members had already been deleted from the database, the display of data on these members is no longer possible; the information about the number of such members will be displayed at the end of the report.
  o The new report *LOAN-CRO-04: Overview of payments (invoices, credit notes, cancellations)* enables the preparation of overviews of issued invoices, credit notes and invoice cancellations.
  o The report *LOAN-Mb-02* was renamed to *Members by date of last visit* (previously: *Active members*) as it only includes members whose last visit was recorded within the time period entered when creating the report. This is why the parameter "Period" was renamed to "Date of last visit".
  o The report *LOAN-Mb-06* was renamed to *Members by date of last visit/by departments*, as it enables the creation of lists of members whose last visit was recorded within the time period and in the selected department. This is why the parameter "Period" was renamed to "Date of last visit".
  o When creating the report *LOAN-Mb-08: List of members with debts*, the search parameters "Services/debts" (enables searching for debts by description) and "Type of service/debts" (enables selecting the type of debt from the code list) were added.
  o When creating the report *LOAN-TR-04: List of cash register transactions*, the search parameters "Payment method" and "Type of non-cash payment" were added. The order of the search parameters was changed. The report was updated with the display of the data on the type of payment and the type of non-cash payment, the order of the attributes was changed, the data in the list is sorted by date and time of transaction.
  o When creating reports that enable the selection of members in the **Member** editor, the option was added for searching in the search fields of the **Member**, **Postal address**, **Telephone**, **E-mail**, **Alternative/invalid numbers**, **Privileges** and **Restrictions** tabs.
  o In the reports *LOAN-TR-01: Transactions for member – membership card No.* and *LOAN-TR-02: Transactions for member – ID No.*, the display of the internal

invoice number was removed. For the purposes of overviewing the payments for a selected member, create the new report *LOAN-CRO-04: Overview of payments (invoices, credit notes, cancellations)*.

V6.11-03, 20–21 May 2017

- Opening of the cash register drawer without debts settlement is enabled. For this purpose, the library using the cash register drawer can use the **Cash register balance / Open the cash register drawer** method in the *Debts settlement and entry* folder.
- Correction in creating overdue notices regarding the grace period in the case of workdays.
- Report *LOAN-EXP-01: List of uncollected debts*
  – The display of discount amount per copy added.
  – The error that occurred when fewer than four overdue notices were sent to members by the library corrected.
- Correction in entering transactions in the case of individual or batch deletion of members.

V6.11-02, 10 May 2017

- When manually entering debts for the member, the option of searching by the item description in the price list was added. For this purpose the search buttons (for **Find** and for **Find next**) were added in the **Debts entry – select service/debts** window.
- Correction regarding the preparation of overdue notices for material on reading room loan (status *S*).

V6.11-01, 3 May 2017

- Correction regarding the preparation of overdue notices in XML format.

V6.11-00(01), 19 April 2017

- When changing the member's membership card number the option was added to delete the old (invalid) membership card number.
- A correction was made regarding the preparation of overdue notices in the format *1 – A4 format/address right*.
- A correction was made regarding the control of availability for loan for routing material (status *K*).
- The error that occurred when deleting a member whose membership card number was changed previously was corrected.

V6.11-00, 15–17 April 2017

- For the purposes of monitoring the success of e-notification, the attributes **Notification status**, **Time and date of notification status** and **Events with notification** were added in the **Notification** class. It is also possible to search by the first two added attributes. Detailed information on the sending of notifications is available in the **Notification** editor if you click the **Events with notification** button.
- The option was added that, when preparing reserved material for collection (**Unavailable material / Prepare reserved material for collection** method), the member is not sent an

e-notification about the received reserved material even though the member is subscribed to e-notifications. For this purpose, the checkbox "Member to be notified." was added in the **Prepare reserved material for collection** window, where you untick the box if you already arranged with the member when the material will be ready to collect. The default value is that the member will be notified. If you decide not to notify the member that the material is ready for collection when processing the reservation, the value *NO (upon library's decision)* will be displayed in the *Notification sent* column.

- The display of the copy status (996/997q) (e.g. *relocated*) was added on the delivery note that is displayed when processing newly received reservations.
- The option was added to enter the return of material with restriction for copies on interdepartmental loan, which is why the **Retain** button in the **Home library material** window is active. By doing so, loan and reservations of material that is still on its way to the host department are disabled.
- Upon the library's request, IZUM can activate parameters that enable the following:
  - specifying the category of members for which the entry of the date of birth is mandatory;
  - specifying the category of members, for which the entry of the guardian/guarantor's name is mandatory;
  - the option of making the entry of the member's gender mandatory; the setting is only applicable to some member categories;
  - the option of making the entry of the municipality of permanent residence mandatory; the setting is only applicable to some member categories;
  - the option of setting departments in which it is required to check if the registration form was signed;
  - the option of setting departments in which a loan restriction for the last issue of a serial applies;
  - The option of setting departments in which library members can reserve material with restricted availability via COBISS/OPAC.
- The option was added to prepare forms for overdue notices in XML format (setting in the *Format and address position* column). The prepared overdue notices on these forms can be saved as XML files in the **Overview and sending of created reports** window, which enables the distribution of overdue notices to library members via special notification distribution providers.
- For e-notifications for users (e.g. e-notification about a forthcoming loan period expiry date) the option was added to enter a special e-mail address to which users can send any questions. The attribute **E-mail address for reply (e-notifications)** can be entered for the home library (**Home library / Contact details and information for COBISS/OPAC** method) but also for an individual department is these e-mail addresses differ based on the department. If the e-mail address is the same for all departments it can be entered for the home library only.
  Note: The entered e-mail address entered for the user variable **E-mail address for reply (e-notifications)** will no longer be relevant, which means that you have to edit the e-mail addresses on the first workday after installing the software.
- In the calendar window the designation and name of department will be displayed in the title bar (applicable to libraries with departments).
- In the calendar you can specify the days when the library or its department is closed, but they are still considered when calculating the fine. These days can be set by selecting *"fine is calculated"* from the drop-down list in the option *"Type of day when the library is*

closed". You then select one or more days in the calendar and click the **Set** button. These days are marked with a blue border in the calendar. By default, the days when the library is closed are not considered when calculating the fine (they are marked with a red border).

- For the **Member / Entering/settling debts** method the note entered when entering the debt is also displayed in the list of entered debts for the member and in the overview of transactions. When using the **View settled debts** method the note that was entered when entering the settled debts for the purposes of being displayed on the invoice will be displayed.

- If the library uses the option that the loan period is renewed in all other departments when renewing the loan period for all copies, the data on the department, author and title is displayed for every copy for which the loan period was renewed.

- When entering data on education it is possible to also enter uncoded data for the attributes **University**, **School name** and **Course of study**. Use this option when you wish to enter data on students studying abroad.

- When returning borrowed material to the reading room (status *S*) a warning was added that the material that is on loan in the reading room can be reserved for reading room use (status *U*). The condition is that the validity period for reading room reservations is entered (column *"read"*).

- When processing reservations the window for previewing the list of cancelled reservations will open.

- In the note on material for loan (**Field 996/997 / Enter note for loan** method or double-click on the second row of the Sts/O column in the **Home library material** window) it is possible to enter up to 450 characters.

- When batch deleting inactive members, two separate lists are prepared: *List of inactive members that will not be deleted due to notes* and *List of inactive members that will not be deleted due to entered material and/or debts*.

- In the reports *LOAN-CRO-32: List of invoices (closing out cash register)*, *LOAN-CRO-01: List of invoices*, *LOAN-CRO-02: List of invoices incl. VAT* and *LOAN-CRO-03: Summary of list of invoices incl. VAT*, the data on the range of included invoice numbers was added to the document head.

- In statistics *LOAN-STA-A01: By member category (school libraries)*, *LOAN-STA-A02: By member category*, *LOAN-STA-A03: By municipality/member category* and *LOAN-STA-A04: By mobile library stops/member category* a warning was included regarding taking into account active members in the interim displays and total number of active members.

- In statistics of the group *Loan of material* (from *LOAN-STA-Mt01* to *LOAN-STA-Mt12*) the value *26 – renewal via telephone* was added to the default transactions.

- In statistics where data is listed by municipality (*LOAN-STA-T03: By municipality/member category*, *LOAN-STA-V05: By municipality/member category*, *LOAN-STA-VT05: By municipality/member category (transactions)* and *LOAN-STA-A03: By municipality/member category*) the name of the municipality is displayed next to the code.

- In the reports *LOAN-TR-01: Transactions for member – membership card No.* and *LOAN-TR-02: Transactions for member - ID No.*, the invoice number under which the invoice is recorded in the database is displayed.

- In the report *LOAN-EXP-01: List of uncollected debts* the total amount of unsettled debts for the member is displayed at the end of the list. Once the data is imported to an Excel file the data is sorted by membership card number.

- The data on the area of expertise and the selected reading room is also entered in the member data in the transaction file, if this data is entered for the member (for the purposes of libraries within the COBISS.BG system).
- In libraries that use a joint members' database, the member's date of birth is also checked when checking for duplicates.
- A correction was made related to the name of files with stored credit notes, if several credit notes and their copies were made for the same invoice.
- An option for disabling transactions with sets is added to the self-checkout settings (if the self-checkout does not support sets).

V6.10-03, 25–26 March 2017

- Based on the decision of the Information Commissioner as of 27 February 2017 (No.: 0612-16/2017/8) all e-notifications that are sent to library members by e-mail were changed in the COBISS3/Reports software module so that the received e-mail does not contain any personal details of the member (e.g. *Notification about received reserved material, Notification about a forthcoming loan period expiry date, LOAN-MM-05: Notification about a loan period expiry date (e-mail)*, etc.).
- The library address is changed in all e-notifications for libraries with a superior partner. The address is now created based only on the home library data and not on the superior partner data.
- The report *List of invoices* (*LOAN-CRO-32*) was updated with the display of the VAT base and VAT in the summary tables by service type and VAT rate.
- If the member has blocked the receipt of SMS-notifications, this is visible as follows:
  - the reason is listed in the **Member** editor under the restriction "SMS-notifications blocked with operator";
  - the abbreviation *SMS* is displayed next to the "Restrictions" attribute and the restrictions in the related objects*;*
  - the information about the blockade is listed in the **Home library material** window in the restrictions.

    The additional search field "SMS-notifications blocked with operator" was added in the **Member** editor in the **Restrictions** tab for the purposes of searching the reasons for the blockade.

- Correction regarding the e-notification about forthcoming overdue notice.
- Correction regarding the preparation of lists when batch deleting inactive members in libraries with several departments.
- Correction regarding entering settled debts from the group *99 – OTH other*.
- Correction regarding the number of days overdue in the **Home library material** window.

V6.10-02(02), 13 March 2017

- Correction regarding the creation of lending forms for newly received reservations.

V6.10-02(01), 8 March 2017

- Data entry was corrected for e-notification in the **Member** editor.

- Member entry was corrected for members from the students database for KISUM libraries.
- Labels for membership cards can now also be printed on labels sized 50 x 25 mm.

V6.10-02, 1 March 2017

- The logical destinations *Invoice – Loan* and *Lending form for reservation – Loan* were added. This enables that libraries can set up a different number of copies of these reports for lending forms, invoices and reservations slips (lending form for newly received reservations and slip with reservation details). The new logical destinations are set up in the same way as it applies for the logical destination *Lending form – Loan*.
  NOTE: Once the software update is installed, before starting to work in loan both new logical destinations must be set up, otherwise the invoices, lending forms for newly received reservations and slips with reservation details will not be printed.
- If the library does not use the certified cash register, once a debt is settled, the option of previewing the invoice content will open. The library can then decide whether or not the invoice will be printed.
- The following options are arranged for lending forms for newly received reservations:
  - they are arranged by call number,
  - the additional name of the home library is also displayed,
  - the attribute values are displayed in bold (instead of the attribute names),
  - within the COBISS.BG system the reading room, to which the reserved material must be delivered, is also displayed.
- The error that occurred when entering members from the reference students database was corrected (applicable to libraries in KISUM).
- The error that occurred when allocating the material to the member was corrected (if upon the deletion of the status *O* or *W* (transaction *17*) the material is allocated to the next member with a reservation, this allocation is entered as transaction *15*).

V6.10-01, 18–19 February 2017

- If the reference students database does not contain the data on the mode of study, the member category *004 – students (full-time)* is defined when entering a member with the transfer of data from this database.
- The error that occurred when closing a larger number of cash registers at the same time was corrected.
- The code lists *Area of expertise (CODE 325)* and *Reading room (CODE 326)* were added to the local code lists for the purposes of libraries within the COBISS.BG system.

V6.10-00(02), 1 February 2017

- The error that occurred while checking membership validity when entering loan procedures in retrospect was corrected.
- The error that occurred in relation to blocking reservations in COBISS/OPAC and COBISS+ for reading room material with the status *6 – damaged* was corrected.

- The error that occurred when identifying members on devices that operate via SIP2 was corrected.

V6.10-00, 28–29 January 2017

- **Entering the net price per unit to the nearest ten-thousandth**

  In the price list in the **Services/debts – group** editor when entering the price per unit it is possible to enter the price rounded off to the nearest ten-thousandth (up to the fourth decimal place). This means that libraries that charge VAT for certain services/goods enter the price excluding VAT (**Price per unit** attribute) so that once the VAT is calculated, the price including VAT (**Amount** attribute) is the same as the price in the official library price list.

  When charging for services and goods, in accordance with the rules for rounding off prices for all calculations up until the final amount that the library member must pay for the services/goods, all sub-total amounts are calculated based on the net prices rounded off to the nearest ten-thousandth. The invoices, credit notes and invoice cancellations include the price, value of goods/services, calculated VAT, payable amount and return amount rounded off to the nearest hundredth.

  NOTE: All libraries liable to pay VAT **must**, after installing the new version of COBISS3 software, check the items on the price list, for which VAT is calculated, and correct the net price (**Price per unit** attribute) so that the price including VAT (**Amount** attribute) will be the same as the price in the official library price list. Otherwise it might happen that the price incl. VAT may be different to the price in the official price list.

- **Entering debts after switching to entering net prices rounded off to the nearest ten-thousandth**

  For all already entered debts, the amount to be settled will be calculated based on the net price that was valid when the debt was entered, and will be rounded off to the nearest ten-thousandth.

- **Printing invoices, invoice cancellations and credit notes for libraries liable to pay VAT**

  On the reports of invoices, invoice cancellations and credit notes the price of goods/services is displayed as the price incl. VAT; the total value of goods and services is also displayed as the amount incl. VAT.

- **Information about member debts**

  In the My library service on the lending form, notification about outstanding debts and overdue notices (if the information about unsettled debts is displayed on the lending form and/or overdue notice in the library), the displayed debts of the member towards the library are rounded off to the nearest hundredth.

- **Warning about entered debts for services/goods for which VAT is calculated**

  If the member has entered debts for services/goods for which VAT is calculated, a warning is displayed when switching to the **Home library window**. An invoice for such services/goods must be issued at the end of the VAT end period.

- **Reports related to cash register transactions**

  In the following reports, the prices are displayed without VAT, prices including VAT, value of services/goods, VAT base and calculated VAT rounded off to the nearest hundredth, based on the price/value, rounded off to the nearest ten-thousandth:

  - *Price list*

- *List of cash register transactions*
- *List of invoices (closing out cash register)*
- *I-BP-01: List of invoices*
- *I-BP-02: List of invoices incl. VAT*
- *I-BP-03: Summary of list of invoices incl. VAT*
- *I-C-08: List of members with debts*
- *I-TR-04: List of cash register transactions*
- *in the data export for the purposes of FURS (the files REPORT INVOICES HEADERS.TXT and REPORT INVOICES ITEMS.TXT)*

- **Saving invoices, invoice cancellations, credit notes and copies of these documents in PDF format**

  When printing an invoice, invoice cancellation, credit note or copies of these documents, each document is saved automatically in PDF format. This enables subsequent printing of documents for internal use and issuing copies in the same form and with the same contents as the original. In the archive of each document, all related documents are available as well (e.g. the original invoice is available in the credit note archive). The documents are available via the **Archive** object method, which can be found for the objects **Invoice** and **Credit note**.

- **Creating copies of invoices, invoice cancellations and credit notes**

  Copies of invoices, invoice cancellations and credit notes are now created based on the documents saved in the archive in PDF format. The copy of an invoice and copy of an invoice cancellation are still created using the **Invoice / Create copy** object method; whereas the copy of a credit note is created using the **Credit note / Create copy** object method.

- **Removing some methods related to printing invoices, invoice cancellations, credit notes and copies of these documents**

  Archiving issued invoices, invoice cancellations and credit notes in PDF format enable the creation of copies and re-printing these documents based on the archived original, which is why the options **Invoice** and **Cancellation of invoice** were removed from the object methods **Invoice / Print** and **Invoice / Send**, whereas the **Credit note** option was removed from the object methods **Credit note / Print** and **Credit note / Send**.

  In the COBISS3/Reports module it is no longer possible to print out an invoice, invoice cancellation, credit note and the copies of these documents.

- **Archiving already issued invoices, invoice cancellations, credit notes and copies of these reports in PDF format**

  When installing the new version of the COBISS3 V6.10-00 software all issued invoices, invoice cancellations, credit notes and copies of all these documents will be archived in PDF format. The content of these reports will be the same as if these documents were newly created in the COBISS3 V6.9-00 software), but without the data on the entered material and the entered debts. Copies of these documents are created based on the archived documents by using the **Invoice / Create copy** method and the **Credit note / Create copy** method.

- **Credit note cancellation disabled**

  A software control was added that disables the cancellation of a credit note.

- **Cancellation of invoices, not issued on the current day, disabled**

  It is only possible to cancel settled debts on the current day.

Tip: To avoid subsequent error detection when settling debts, it is recommended to check the balance of the cash register daily and to use the method for closing out the daily cash register.

- **POS terminal**

  For cash register operations for the purposes of non-cash debts settlements, it is now possible to use the NLB (Nova Ljubljanska banka, d. d., Ljubljana) POS terminal. Upon the library's request, IZUM can turn on a special parameter for using the POS terminal. The POS terminal settings are defined with the **System / Settings / POS terminal** method.

- **Updating the list of attributes of the »Member« class**

  In the list of attributes that are displayed in the browser when selecting the member, the values of the following attributes will be displayed from now on: **E-mail address for e-notifications**, **University**, **Name of school**, **Level of study**, **University in eVŠ**, **Study programme in eVŠ**, **Level of education** and **Mobile library stop**. These attributes will also be available in the *Data export tool* in the **Member** class.

- **Update of searching in the catalogue**

  Searching in the catalogue has been updated so that records for e-books are now also included in the search results. For libraries with departments, searching e-books is only included if you search in all departments, which is why you have to select the option »all departments« from the drop-down list of departments.

- **Setting up search fields in the catalogue**

  When searching the catalogue you can now set up the search fields you use for searching most frequently. To set up the search fields for the **Field 996/997** tab, select the desired search fields in the search window of the **Field 996/997** class and save them by clicking **Save query**. To set up the search fields in the **Bibliographic record** tab, set up the search fields in the same way in the search window of the **Bibliographic record** class.

- **Loan status report**

  Loan status report has been changed, so that when you search in all departments for department copies without automated loan no COBISS/Loan is displayed. The same applies for loan status report in COBISS/OPAC and COBISS+.

- **Warning when deleting a reservation**

  A warning has been added when deleting a reservation in the **Home library material** window. The person at the lending desk must confirm that the reservation should be deleted. The warning is displayed when deleting reservations of available or unavailable material (status *O* and *R*) and of material waiting for the member (status *W*).

- **Loan period for reading room loan for material, reserved in the reading room**

  When borrowing material for reading room loan, for material that was previously reserved for the member for reading room loan (status *U*) the current date is set as the due date for reading room loan. As a rule, material can only be on reading room loan for one day which means that the due date is the same as the loan date. Until now the due date was the same as the reservation expiry date.

- **Printing membership cards**

  It is now possible to print on plastic cards to make membership cards using the Zenius printer (by Evolis). It is possible to print the name, surname, membership card number and barcode. The name and surname can be printed in small or capital letters, or some data can be excluded from the printout. For the purposes of printing membership cards the new logical destination *Card - Loan (member)* was added. Before you start using the printer the logical destination must be edited by adding the appropriate driver for the

Zenius printer and then selecting graphic printing and landscape in the details. The card is printed from the workspace by using the **Member / Print** or **Member / Send** method and selecting the report definition **Card for membership card**. If a library decides to start printing membership cards, an installation request must be sent to IZUM (defining and positioning the data that should be included on the card).

- **Individual membership fee – taking into account workdays**

  When defining the membership validity (**Membership validity** attribute) you can limit the duration of the membership validity in days so that only workdays are taken into account. In this case you have to enter the * sign in front of the membership validity duration in the values within the local code list Membership fee type – individual (CODE 318). For example: If you offer a membership of three workdays, enter the membership validity as follows: *06 – three-day membership#*3d*.

  The workdays will be taken into account as listed in the library's calendar; if the department has a separate calendar, the department calendar will be taken into account instead.

- **Loan statistics**

  – For loan statistics, the names of the statistical reports have been shortened as the type of statistics is visible from the name of the groups of statistics in each folder or subfolder.

  – In the group of statistics *LOAN-STA-OT … – Visit by transactions* the way of counting visits of members who were active via the My library service, has been changed.

  – For statistical reports *Visit by transactions* (statistics *LOAN-STA-VT01* to *LOAN-STA-VT07*) the transaction *52 – change of data via COBISS/OPAC* is only taken into account if you are preparing a statistical report for all departments (i.e. if the parameter "Library department" is not specified). The change of data via COBISS/OPAC is not bound to a specific library department.

- **Overdue notices, e-notification of members**

  The mode for creating and deleting overdue notices as well as e-notifications for members is adapted to processing large amounts of data.

- **Slip with reservation details**

  The second name of the home library is added, the order of the "Validity" and "Reserved" attributes was changed, the attribute values (instead of the attribute names) are displayed in bold.

V6.9-00(04), 28 January 2017
- archiving issued invoices, invoice cancellations, credit notes and their copies

V6.9-00(03), 14 January 2017
- archiving issued invoices, invoice cancellations, credit notes and their copies

V6.9-00(02), 7–8 January 2017
- return of several routing issues at the same time, because the routing status was changed to *closed* only for the last selected issue, disabled

V6.9-00, 14–15 December 2016
- content of the message that is displayed on the self-checkout when borrowing material, already entered for another member, was updated

V6.8-00(05), 19–20 November 2016
- error that occurred when entering the reason for writing off debts corrected

V6.8-00(04), 9–10 November 2016
- error in operation of Omega signature pad corrected
- In the case of subsequent sending of e-notifications, in the notification about forthcoming overdue notice, only the material will be displayed in the list that was entered for the member at the time of the repeat e-notification.
- error that occurred when displaying the library address on overdue notices – multi-layer carbon-copy envelopes corrected

V6.8-00(03), 27 October 2016
- error that occurred when returning material on interdepartmental loan based on the entry of the accession number corrected
- error that occurred when addressing overdue notices in libraries with departments corrected

V6.8-00(02), 12–13 October 2016
- error that occurred during self-checkout procedures corrected
- error that occurred when checking reservations while renewing loan periods corrected

V6.8-00(01), 8–9 October 2016
- notifying members about membership expiry now possible also on the membership expiry date

V6.8-00, 4–5 October 2016
- The options of signing documents on a signature pad and electronic saving of registration forms have been included.
  The new **Registration form** button was added to the **Member** editor and is used to start preparing the registration form. The data is copied from the data entered in the **Member** editor to the registration form. Before the library member signs the registration form by means of the signature pad (**Sign document** method on the prepared registration form), he/she can check the content of the registration form. If necessary, the registration form can also be printed (**Overview and sending of created report** option). Once the member signs the registration form and confirms the signature, the registration form is saved electronically.
  For each member, all signed registration forms are saved and can be viewed and printed by using the **Member / E-documents archive** method. The saved registration forms are deleted automatically when the member is deleted (individual deletion or batch deletion of inactive members). The name, statements and notes on the registration form can be adapted by the library with standard definitions.

The COBISS software supports the Omega signature pad by Signotec.

- In the **Member** editor under the **General** tab the new **Citizenship** attribute was added for entering the member's citizenship. The alternative identification numbers (**Alternative ident. numbers** tab) have been updated with new rows, i.e. personal identification number, Urbana card number, MSISDN mobile phone number and old membership card.

- Before switching to the **Home library material** window a message is displayed for the member with the set restriction "Outside loan not permitted".

- When using the methods **Member / Edit**, **Member / Home library material** and **Unavailable material / Return, delete**, a message is displayed when the member turns 18 and has a guardian/guarantor. Once you click the **OK** button, you can continue with your work. If necessary, you can edit the data on the address for receiving overdue notices in the member data.

- When the library member turns 18, the overdue notice is addressed to the name and surname of the member and not the guardian/guarantor regardless of the settings. This does not apply to members in the category *013 – foreign nationals*, where the overdue notices are always addressed in accordance with the settings for the member.

- It is now possible to activate the opening of the cash register drawer even in a library where different printers are used in individual departments.

- The city and date on the lending form are now displayed in a smaller font size.

- Overdue notices:

  - The overdue notice text is displayed in another font and a larger font size (previously Times New Roman 10, now Arial 11). This change does not apply to overdue notices printed on multi-layer carbon-copy envelopes, as the shape of these envelopes does not allow for changing the space for printing data

  - The accession number of the copy for which the member received the overdue notice is now also displayed among the material data.

  - It is possible to include the library's logo to the overdue notice header. If a library would like to do so, they must send their logo, defined as an image, saved in .jpg or .gif format with the maximum size of 25 x 176mm, to the NCC's e-mail address. By default, the overdue notices are printed without the logo.

  - It is possible to add a picture of the signature of the person, responsible at the library, under the type of data 6 (*Signature on overdue notices*). If a library would like to do so, they must send the responsible person's signature, defined as an image, saved in .jpg or .gif format with the maximum size of 25 x 80mm, to the NCC's e-mail address. By default, the overdue notices are printed without the signature.

  - Overdue notices, issued to library members in the category *125 – legal entities, external institutions*, are now addressed to the name of the superior member/partner, and no longer to the name and surname of the member who deals with library business on behalf of the legal entity. As a result, overdue notices are not counted as personal mail of the employee of the superior partner/member.

- On reports that the library issues and/or sends to its members (lending forms, invoices, cancellations of invoices, credit notes, A4 overdue notices), the display of data on the document issuer has been standardised (library/department address).

- In the process of preparing lending forms and invoices the name of the data was changed from "1. Department under library name" to "1. Data on department/additional data", as editing this type of data provides new options for setting the address for both libraries with departments and libraries without departments.

- On invoices and lending notes that the library issues to members in the category *125 – legal entities, external institutions*, the data on the name and surname of the person who uses library services on behalf of a legal entity or an external institution is no longer displayed. Only data on the legal entity or the external institution will be displayed (name, head office address, tax number and/or VAT ID no.).
- On lending forms for material with the status *lost*, the date when the status validity expires is now displayed (instead of the date when the copy was marked as lost). The name of the column where this date is displayed was changed from "lost/type" to "valid to/type".
- In the price list (**Services/debts – group** editor) it is now possible to enter piece and hour as units of measure.
- When creating the reports *LOAN-TR-04: List of cash register transactions* the search parameter "Member ID" was removed. The contents of the report were updated with the display of the data on the membership card number. The report will also contain an updated with a summary display of cash register transactions by username and type of cash register transaction.
- In accordance with 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)* the display of data on invoices for cash transactions was changed, i.e. the files REPORT INVOICES HEADERS.TXT and REPORT INVOICES ITEMS.TXT. The data for both files can be prepared by using the **Invoice / Display data on issued invoices (REPORT INVOICES HEADERS.TXT)** method or the **Invoice / Display data on issued invoices (REPORT INVOICES ITEMS.TXT)** method and is no longer prepared in the COBISS3/Reports software module.
- The error that occurred when lending material in the host department if there were reservations in the parent department is now fixed.
- The error that occurred when sorting material on the lending form so that the material with an older expiration date is on the top of the lending form is now fixed.
- The error that it was not possible to enter the transfer from the mobile library for the material that became unavailable for loan is now fixed.
- The error that it was possible to reserve material for the department in the host department is now fixed.

V6.7-01, 9.– 10. July 2016

- The "Mobile library stop" search field is added in the **Member** search window.

V6.7-00, 25 –26 June 2016

- The display of library material data that appears in the **Insight into the library material status** window is updated. Now the following details are displayed for monographs: author, title, publication year and language of publication, whereas the following details are displayed for serials: title, ISSN number, language of publication and publisher.
- The member receives an overdue notice on the day that follows the loan period expiry date for the material placed on loan in reading room (status S) and not returned on the

same day. In relation to all further overdue notices, grace periods specified with loan-related time parameters are observed.

- In the library you can now define the e-mail address where copies of e-notifications are to be sent. Use the **Home library / Contact details and information for COBISS/OPAC** method; the window will open, where you can enter the relevant e-mail address under "E-mail for copies of e-notif.". If the library has departments and you wish that copies for an individual department are sent to a separate e-mail address (not the one defined with the method **Home library / Contact details and information for COBISS/OPAC**), enter the e-mail address in the **Department** editor, under "E-mail for copies of e-notif.".

- In relation to limiting the number of copies placed on outside loan, it is now possible to determine the maximum number of items placed on outside loan, regardless of the type of library material. Enter this number by using the **Home library / Restrictions on operations** method; enter it under *Restricted number of copies on loan – outside loan*, under »max. total number«. If restrictions concerning the maximum number of items that can be placed on outside loan for individual types of library material are specified, they are taken into consideration, too. In such a case, the member can borrow the maximum number of items of an individual type of library material, whereas the total number of items placed on loan may not exceed the number, specified as the maximum total number.