



## COBISS3 software

### Loan updates description

#### [Description of updates from version V13.0 onwards](#)

##### V13.0, 16 – 17 September 2023

- For the COBISS – SAP connection, from now on the data is transferred to the account for cash payments and the account for non-cash payments based on the invoice payment method. In libraries where this option is activated, the new **Non-cash payments account** attribute was added to the price list items for entering the appropriate account number, and the **Transitional account** attribute was renamed into **Cash payments account**.
- When viewing archived invoices, invoice cancellations and credit notes, a watermark saying *NOT FOR PRINT* is displayed over the content. If you wish to prepare a new printout of these documents for the member or for internal purposes, use the **Create copy** option.
- For invoices that are partially paid and for which the remaining debt was written off, it is no longer possible to prepare a credit note or an invoice payment cancellation.
- In libraries where the pickup location functionality is activated, for a reservation of material on interdepartmental loan via COBISS+, the reservation is always recorded in the department where the material is located at that moment, i.e. the host department (even if the material will be collected from the parent department).
- Change when processing reservations of unavailable material in libraries where the pickup location functionality is activated: the material on interdepartmental loan in the host department that is on loan to the member, is, once the return in the host department is recorded, automatically (without confirmation) appointed to the member with a reservation in the parent department even if the material is reserved in the host department. If the material is only reserved in the host department, then the material that is returned in the host department is automatically (without confirmation) appointed to the member with the reservation in the host department.
- If the library charges for collecting material from another location, the cost is not charged if the member reserves a copy of material on interdepartmental loan via COBISS+, which is available in the host department, and select the pickup location in the host department or the parent department of the material upon the reservation.

- In libraries with pickup locations we are working on solutions related to the option of reserving a parcel box via COBISS+ for the return of material. For this purpose, the new attribute **Parcel box reservation type** in the **Parcel box** class for selecting the reservation type for the parcel box (reserving a parcel box for the collection or return of material) and changed the values in the code list of delivery statuses to the parcel box accordingly.
- The restriction *Renewal denied* for the member no longer disables the loan of e-books.
- In libraries where it is checked if the address complies with the GURS (Surveying and Mapping Authority of the Republic of Slovenia) Register, when entering a new postal address, the mode of the conformity check and help was changed. Instead of the **Postal address autocomplete** entry field in the **List** window, the new **Help with entering address** button was added in the **Postal address** window. When you enter the postcode, city or street from the drop-down list, matching values are provided, from which you can select the appropriate one. After clicking the **Confirm** button, the data, if it complies with the GURS (Surveying and Mapping Authority of the Republic of Slovenia) Register, is copied into the **Postal address** window, where the conformity check is performed once you click the **OK** button. When entering an address outside Slovenia, also enter the country, and the conformity check is not performed.
- When changing the membership card number, a warning window was added where you have to confirm the change.
- The new report *LOAN-MM-11: Notification about a loan period expiry date for material from all departments (mail)* was prepared. You can use it to prepare notifications for the members with a list of material for which the loan period is about to expire or has already expired. Notifications intended for printing on the printer are prepared for material from all library departments.
- Members with entered material are now sorted by surname in the report *LOAN-MM-01: Members with entered material*.
- Bug fixes:
  - when displaying the content of a notification for an attempt of a non-cash payment cancellation outside the library;
  - for the procedure of entering a debt settlement for a non-member, if the invoice was not approved at FURS (Financial Administration of the Republic of Slovenia);
  - when displaying data on an invoice cancellation for a non-member;
  - when displaying data in the **Select issues** window when returning a serial by entering the accession number without the issue designation;
  - when updating the date of the last visit of a member when borrowing an e-book;
  - when displaying *Permanent reservation for a member*;
  - when displaying data in the **Unavailable material** editor and when viewing the material that is routing.

**V12.1.8, 22 June 2023**

- If English is selected as the interface language in COBISS+, the pickup locations are also displayed in English.
- Bug fix for the speed of closing the cash register.

**V12.1.7, 12 June 2023**

- Bug fix when returning material that is retained in the department (status *B – retained*).

**V12.1.6, 10 June 2023**

- Bug fix when returning sets and setting up protection if the library uses RFID.

**V12.1.5, 20 May 2023**

- In libraries with departments where the pickup location functionality and the parameter for automatic entry of return with restriction in the host department are activated, the return with restriction (status *B – retained*) is now also entered automatically, if you delete the reservation of material that is already prepared for collection for the member (status *W*) if there are no additional reservations for this material neither in the host department nor in the parent department.
- Bug fixes:
  - when entering the loan at the self-checkout (the loan of the same copy was entered several times);
  - when displaying the data on a set when appointing a reserved set that is available with restriction;
  - when sending a notification for resetting a forgotten password for My library (if the same e-mail address is already entered in the addresses and in the e-notification details for the member).

**V12.1.4, 20 April 2023**

- The amendment of the Fiscal Validation of Receipts Act reintroduces the mandatory handing out of invoices, so the automatic printing of invoices, cancellations and credit notes in the COBISS3/Loan software module was reactivated.
- In the **Cash register balance** class, the new **Prepare a list of non-cash payments outside the library** method was added. It is used to prepare a list that contains summary and details data on such payments (e.g. display by department of entry, by usernames, by type of service, etc.) for a selected period. This functionality replaces the option of preparing a list of non-cash payments outside the library that was available until now when closing the cash register and checking the cash register balance.
- Bug fixes:
  - when cancelling the procedure of debts settlement for a non-member;

- when creating a new discount – the default value under **Valid every year** is blank.

### V12.1.3, 6 April 2023

- In libraries that use the tax register, the digital certificate used by the library for the purposes of identification and electronical signatures in the process of approving invoices, is saved to the folder C:\Cobiss3Files\cert. From this folder, it can then be installed following the prescribed procedure.
- Bug fixes:
  - when cancelling the procedure of debts settlement for a non-member;
  - when returning conditionally available material that is reserved;
  - when returning material that is on loan in the reading room.

### V12.1.2, 1 April 2023

- Changes and updates in the procedure of closing the cash register:
  - when calculating the cash register balance, the actual invoice payments are now taken into account. If the member does not pay the invoice in full, the cash register balance increases by the actual payment amount and no longer the full invoice amount. Once the member settles the remaining debt, the cash register balance will increase by the amount of the settled debt.
  - in the **Closing out cash register – open cash registers** window, the **Check invoices window** was renamed into **Check**.
  - the new report *LOAN-CRO-35: List of invoices* was prepared, which is created during the procedure of closing the cash register (**Check** option and **Close** option). The report consists of two forms: the first one shows the summary data on cash register transactions (e.g. overview by payment method, type of cash register transaction, by type of service, debt, etc.), and the other form includes the analytical data on all transactions.
  - for the selected cash register, you can use the new **Cash register balance / Report on cash register balance** object method any time to prepare the record *LOAN-CRO-35: List of invoices*.
  - the report *LOAN-CRO-32: List of invoices*, which was prepared until now in the process of closing the cash register, can still be prepared on an individual cash register by using the **Print** method or the **Send** method. The report name now also includes the additional text that it was valid up until version V12.1.2 (April 2023). The report is only useful for cash registers that were closed before the installation of COBISS3, V12.1.2.
- In libraries with pickup locations, where the link to the application of the parcel box producer Direct4Me is not activated, when selecting the pickup *location material pickup from parcel box* (when reserving material via COBISS+ and when changing the pickup location when entering a reservation for the member), it is no longer

checked if the member's data for e-notifications contains the mobile phone number.

- When entering a new member, a warning was added when you leave the **Member** window by clicking **Close** or **X**.
- Bug fixes:
  - when entering the e-mail address with the **Registration / Updating member data – school libraries** method;
  - when returning material that is reserved and has the status *4 – in revision*, in another department;
  - when lending a copy with the work designation in field 996/997dx;
  - when preparing the report *LOAN-Mt-09: List of materials without transactions (by copies)* for serials;
  - in the content of the push notification about a forthcoming overdue notice.

#### V12.1.1, 11 March 2023

- Bug fixes:
  - when entering a cash register transaction in the case of a non-cash payment outside the library;
  - when sorting data in lists.

#### V12.1, 4–5 March 2023

- The option of debt write-off was added.
- The procedure of batch deletion of inactive members was updated:
  - if a debt is recorded for the member due to a partial invoice payment, the member will not be deleted,
  - in the window with short statistics on deletion, the **Number of inactive members that will not be deleted because they have unsettled debts to a partial invoice payment** will be displayed,
  - the list of members that will not be deleted in the deletion process due to unsettled debts was updated with the list of members with debts.
- When paying a debt that was caused by a partial invoice payment, it is possible to select the payment method.
- In libraries that use RFID readers and also have a mobile library, the **Scan RFID** button was added in the **Enter material transfer to and from mobile library** window for the purposes of scanning material with a reader.
- The report *LOAN-Mt-12: Available material in host department* was updated with the information about the host department.
- Bug fixes:
  - when taking into account the limit of the number of loan renewals via automated phone service;
  - when entering the transaction department for transactions in My library;

- when accessing records that are automatically saved when performing some procedures;
- when transferring material to the mobile library.

#### V12.0.5, 4 February 2023

- Bug fixes:
  - when reserving material based on the selected bibliographic record in the **Catalogue** window, if the loan in the library is organised by departments and the pickup location functionality is activated;
  - when recording the return of material in another department and when recording the return of material on interdepartmental loan in the host department and appointing material with a reservation in the parent department, if the unavailable material was reserved in the parent department before pickup locations were activated;
  - when deleting an overdue notice for material in a set, if the library allows loan period renewals for material with an overdue notice;
  - when appointing material for collection for a member in the parent department, if the material was previously returned in another department (applicable in libraries with pickup locations);
  - when entering the transaction department when paying a debt that was created because of a partial invoice payment;
  - when searching by the attribute **No. of visits a year (LOAN)**.

#### V12.0.4, 14 January 2023

- Bug fix when searching for material in loan procedures, if you search by accession number with an \* (asterisk).

#### V12.0.3, 21 December 2022

- In libraries where the pickup location functionality is activated and which enable the collection of material from the parcel box, the tracking number structure was changed (**Parcel box** class).

#### V12.0.2, 19 December 2022

- Bug fix when returning material in another department, if the material is reserved in the parent department and will be collected from there (in libraries where the pickup location functionality is activated).

#### V12.0, 10–11 December 2022

- In My library in the loan history the material on loan to the reading room is also displayed. Reading room loans are also taken into account when calculating the

number of loans of each title of material in the shared bibliographic/catalogue database.

- The technology on which the students' reference database is based has been changed.
- Recording loan transactions was updated with the data on the type of pickup location and the material pickup date. The data will start being recorded in the transaction files after the installation of version V12.0, data will not be added retrospectively. New data usage:
  - when using the data export tool, it will be possible to select it from the list of attributes for display, based on this data, it will be possible to form a query,
  - when preparing statistical reports where a transaction search window opens, this data is added to the list of search fields.
- In libraries that charge overdue fees based on the settings in the calendar, it is now possible to set the day when the overdue fee is not charged even if the library or department is open. The procedure is similar to setting up the days when the library or department is closed but the overdue fee is still charged. These days are indicated with a **green frame** and are only visible next to the **OVERDUE FEE** option.
- The option of reserving material for members with the restriction *Outside loan not permitted* was added. The option is activated with a special parameter upon the library's request. If the parameter is activated, the member can reserve the material in My library and then borrow it in the reading room after collecting it.
- Bug fixes:
  - for the **Member / Change class/grade** method when saving the transfer table;
  - in the structure of the file name that is created when using the **Member / Update member details – export** method;
  - of the texts for the **Member / Entering/updating members details – school libraries** method;
  - the content of the text was changed that is displayed when working with members in recovery;
  - when creating invoice items in the case of online payment;
  - default values of variable texts in the member notification about material home delivery;
  - when automatically recording a return with restriction (status B – *retained*), when you record the return of material for the member in the host department, and the material does not have any additional reservations neither in the host department not in the parent department;
  - when displaying the date of appointing reserved material to the member in the **Insight into the library material status** window;
  - when returning material via self-checkout;
  - when processing reservations of available material (for the **No material** method);



- when processing reservations of available material (for the **To pickup loc.** method);
- when recording the return of a set, if the member returns the material to another department, if there is a reservation for this material in the parent department and the member with the reservation will collect the set from the parent department;
- when entering the condition *cirSta* (loan status) for the pickup location (in libraries that have the functionality of pickup locations activated);
- when displaying a non-cash payment on the invoice;
- when displaying the date in notifications sent by e-mail;
- when selecting the copy that is most accessible for loan, when reserving the material via COBISS+, the availability level (996p) and the loan restriction (996u) are taken into account;
- change in system text at the end of e-notifications.

#### V11.0.4, 24 October 2022

- Bug fix when processing a reservation of available material (for the **To pickup loc.** method), if the pickup location functionality is activated and the material will be collected from another unit.

#### V11.0.3, 22 October 2022

- In libraries where the pickup location functionality is activated, in the table with recorded items of material that you open for the member (in the **Home library material** window or by selecting the **Home library material** link), the "Overview of entered material by all department" display was updated with the attributes **Reservation status**, **Label for the reservation processing location** and **Label for the material pickup location**.
- In libraries where the pickup location functionality is activated and that also enable the collection of material from the parcel box, it is possible to enable with a special parameter that when processing a reservation of available material, for which the pickup location is specified as *material pickup from parcel box*, a software control is performed which impacts the operation of the methods **To pickup loc.** and **For pickup**. The **To pickup loc.** method can only be performed for a reservation with the status *processed*, when the parcel box from which the member will collect the material is already reserved for the member. The **For pickup** method cannot be performed under any circumstances, as it is performed automatically when the material is placed into the parcel box.
- Bug fixes:
  - when reserving available material via COBISS+ in libraries where the pickup location functionality is not activated but priority reservations are enabled;
  - when preparing the students' reference database;
  - change of text for a partially paid invoice.



**V11.0.2, 10 October 2022**

- Bug fixes:
  - when cancelling the preparation of a credit note;
  - when reserving material available with restriction via COBISS+;
  - change of text when the limit of number of reservations for the member is reached.

**V11.0.1, 15 October 2022**

- Bug fix when creating the members' database, if the name or surname of a member contains an apostrophe.

**V11.0, 8–9 October 2022**

- **Partial settlement of debts**

Partial settlement of debts, which was available until now and which allowed the member to pay only a part of the entered debt has been replaced with the option for partial invoice payment. If the member does not pay one or more selected debts in full, the following happens when they make a partial payment:

- an invoice will be issued for all selected debts in full,
- a transaction of debts settlement in full is entered for all selected debts,
- data for the complete invoice will be sent for tax confirmation to the Financial Administration of the Republic of Slovenia (FURS).

The invoice amount that will not be paid will be calculated based on the amount entered in the **Debts settlement** window, in the field **Amount due**, and it will be automatically entered in the class **Partially paid invoices**, where you can see the information about the invoices that were not paid in full. When a partial payment occurs, a slip with information about the partially paid invoice details will be printed. Once the member pays the remainder of the invoice amount, this payment will be entered in the class **Partially paid invoices – settled**, and a slip will be printed with information about the payment of the remainder of the debt.

Information about invoices not paid in full, are visible in the cash register of the member in the window **Entering and settling debts**, where the table **Remainder of debt after partially paying the invoice** has been added. Once the member pays the remainder of the debt, you enter this in the window **Entering and settling debts** by clicking **Pay debt**.

Printing the information about partially paid invoices and payment of debts from partially paying the invoice is included in the reports for the field of cash register operations. Two new reports are also prepared, which enable the preparation of a list of partially paid invoices and a list of debt payments as well as searching data about these events.

Entered debt remainders because of partially paid invoices are not taken into account in valid restrictions when using library services, which are applicable to unpaid debts.

We have decided to change the operation because of errors which arose when estimating the conversion of the units number of services or debts occurring after partial payment. When preparing this solution, we used the practices of companies and other institutions for issuing invoices in similar situations.

- **Entering data on debts account, incomes, cash register and VAT**

COBISS3 represents an auxiliary accounting record, so the entering of accounts data needs to be enabled for the purposes of bookkeeping data and monitoring the cash register transactions:

- in the local code list *VAT accounts (CODE 330)* you enter the accounts, where VAT is booked, by individual VAT rates,
- in the local code list *Cash register accounts (CODE 331)* you enter the accounts, where cash register payments are booked according to the type of payment,
- debts account and income account is specified in the price list for each price list item.

If the library does not enter data on accounts, it will not be possible to classify and display data by accounts (e.g. on the itemisation report, list of written off debts, etc.).

- **Calculating the status of debts**

In the option **Entering and settling debts**, there are two new options added to the **Transaction** class:

- **Charging of debts**
- **Charging the status of debts on the selected date**

**Before you use one of these two methods, you need to enter the data on the accounts of the cash register, VAT, debts and income.**

Currently, both methods enable the calculation of status on the accounts of debts, income, VAT and cash register. When executing the method **Charging of debts**, the status of the debts is calculated in the moment of executing the method and at the same time a new transaction *15 – charging debts* is also entered. This cash register transaction was introduced to charge the status of the debts faster, which is prepared with the method **Charging the status of debts on the selected date**. The method enables you to calculate the status on the accounts for any date in the past.

**ATTENTION:** When calculating the status on the accounts, only the debts entered from version V 11.0 (from 9 October 2022 on) are taken into account.

**Both options are installed as a prototype for the purposes of preparing a software support for the option to calculate the state of debts on a selected date.** In this version, the solution was brought to a point, where you can display the status on individual accounts. We will continue to update the function in future versions, to incrementally arrive the final result – the option to calculate the status of open debts on a selected date. You can read more about the current operation in the user manual in the chapter Calculating the status of debts.

We will happy to get your reaction and feedback about the operation of the added options, which will enable us to correctly upgrade the operation of these procedures in the future.

- **Itemisation**

Daily turnover in the library is formed by debts, income and VAT obligations, which need to be booked into the main book as well as into VAT records if needed. You can prepare the itemisation in the COBISS3/Reports software module with the new report *LOAN-CRO-08: Itemisation for bookkeeping of turnover from COBISS3 to the main book*. The report shows calculated turnover amounts in the accounts of debts, income, VAT and cash register as well as paid debts by individual VAT accounts.

You can read more about bookkeeping of turnover into the main book in the journal *Revija IKS*, article *Zaračunavanje in plačila storitev uporabnikov v knjižnici* (*Charging and payments of user services in a library*) published in issue 8/9.

- **VALÚ**

Option for non-cash payment of services and goods with the smart wallet VALÚ. To include the service of paying with VALÚ, you need to send a request to the VALÚ service provider and notify IZUM, so we can send you instructions for editing the required settings.

- **Overview of entered debts**

The overview of entered debts prepared with the method **Entered debts / Overview of debts** can also be printed out by clicking the **Send** button in the window with the list of debts. You can also prepare the overview in the COBISS3/Reports software module with the new report *LOAN-CRO-09: Overview of entered debts*.

- **Writing off debts**

On the *List of written off debts*, which is prepared when you execute the method **Entered debts / Batch write-off of debts**, we have added a column with data about the account of the written off debt and a summary display of written off debts by accounts. This data has also been added to the report *LOAN-TR-04: List of cash register transactions*.

- **Exceptions when charging of material pickup cost**

In automatic charging of material pickup cost, you can specify exceptions for charging this cost, which means that the cost will not be charged. You specify them in the local code list *Calculation of material pickup cost (CODE 329)*.

- In the **Transaction** class in the folder **Entering and settling debts** you can search by the number of invoice, credit note and cancellation of invoice for this kind of documents that will be issued from the installation of the version V 11.0 on.
- The contents of the note, which is displayed when you renew loan for material, for which a longer due date was achieved, is updated.
- We have enabled the deactivation of the check for entering e-mail for e-notifications for guardian/guarantor for members that are of age. The check is especially useful for secondary school libraries and is managed based on a written request from the library by setting the appropriate parameter.
- Invoice cancellation is only possible for invoices issued in the same business premises and on the same electronic device.

- When entering a partial debt settlement a note appears and the library worker must confirm that they want to reduce the settlement amount.
- When deleting member data, a check has been added if the member has an entered debt because of partial invoice payment. In this case, deleting member data is not possible.
- A warning is added before you open the **Home library material** window if the selected member has entered debt because of partial invoice payment.
- Confirmation on the online payment in My Library is now sent as an attachment.
- We have prepared a new report *LOAN-Mt-12: Available material* in host department. The report enables you to prepare a list of material that is on interdepartmental loan in the selected department and it is available in this (host) department.
- Data on partial invoice payments and payment of debts from partially paid invoices has been added to the reports for the field of cash register operations (LOAN-CRO-01, LOAN-CRO-02, LOAN-CRO-03, LOAN-CRO-04 and LOAN-CRO-32, the latter is prepared when closing the cash register).
- Upon a request from the library, a special parameter can be used to enable to automatically enter return with restriction in the records of host department material (status *B – retained*) and a slip is printed *Returned in another department*, when you enter material return for the member in the host department (deleting the status *C – on loan* or *B – retained*). In libraries with departments that have pickup location functionalities activated, return with restriction is automatically entered in the host department only if the member is returning material that does not have additional reservations in the host or parent department.
- The pickup location is show bold and in a bigger font on the report *Lending form for newly received reservations*.
- The option for searching by pickup locations and by reservation status is added to the search fields in the search window of the class **Transactions** (in the COBISS3/Reports software module and in the *Data export tool*) and the attributes **Reservation status** and **Reservation processing location** are added to the default display of search results. When searching for transactions by pickup location or by reservation processing location, the software distinguishes between upper and lower-case letters, so you need to enter the search request (designation of the pickup location or of the reservation processing location) as it is saved in the Elastic database or you will not get any results. You can, of course, truncate the search request with the "\*" symbol.
- The option for searching by pickup locations and reservation status is added to the search windows in the search window of the class **Unavailable material**.
- Data reports about the status of the material on loan is updated in libraries that have pickup location functionality activated. In the window **Insight into the library material status** (button **View** in the catalogue and the method **Field 996/997 / View**) the designation of the pickup location is displayed for reserved material (status *O*, *W* and *R*) and for reserved available material (status *O* and *W*) also the reservation status. The pick-up location is also displayed for copies on loan (status *C*), which you loaned based on a previous reservation.

- Software check is added. You can only add or remove a copy from a reading set, which is not on interdepartmental loan and which belongs to the department, where you are logged in.
- The text of the tool tips in the **Note** editor has been changed.
- When the user reserves material in libraries with departments that have pickup location function activated, the pickup location is now specified based on the bibliographic record in the catalogue, which is the primary pickup location according to the login department. If there are no copies available for loan in the login department, reservation is not possible based on the bibliographic record. Reservation based on the bibliographic record is also not possible in libraries without departments, which have the pickup location function activated.
- In libraries with the pickup location function activated, the attribute **Manufacturer** in the class **Parcel box** has been renamed to **Library ID**.
- Bug fixes:
  - in text in the test SMS;
  - in the report of library data in the notification availability of reserved material sent via e-mail;
  - in the report of cash and returned money on the invoice according to the settings of the lending forms and invoice forms;
  - in the report of attributes in the window **Entered debts**;
  - when calculating the number of late days, if the grace period in the timer parameters table is set in ordinary days (no asterisk);
  - when calculating the number of late days, the grace period also includes days when the library is closed, but it is specified in the settings of the calendar that the fine is charged (blue days), if they are specified in the time parameters table as work days;
  - when registering members for school libraries if you do not want the date of birth;
  - when preparing credit note if you cancel the preparation procedure by closing the **Credit note** window;
  - when picking up material from the parcel box if the member has another available copy of the same material reserved in another unit;
  - in the report of search results in the search window **Unavailable material** for material on loan;
  - when completing the processing of the reservation of missing material and marking a copy as permanently lost;
  - in marking reserved material as missing, if the material is already on its way to the pickup location;
  - in returning material on interdepartmental loan in the host department at a self-checkout, if the material is reserved in the host and the parent department;
  - when reserving unavailable material based on the bibliographic record in libraries with the pickup location function activated;
  - in the display of the link in the general notification sent to the members via e-mail.

**V10.0.3, 13 August 2022**

- When changing the address for mail delivery of reserved material in My Library, the transaction *52 – change of data via COBISS+ and mCOBISS* is entered.
- Bug fixes:
  - when cancelling the reservation in mCOBISS, if the material is already on its way to the pickup location;
  - when calculating the number of late days, if the calendar specifies that the fine is charged for days when the library is closed.

**V10.0.2, 12 July 2022**

- Bug fixes:
  - when preparing material for pickup if the material is reserved for a department and the library does not have pickup locations activated;
  - when entering the number of items in the case of partial payment of debts.

**V10.0.1, 20 June 2022**

- Bug fixes:
  - when calculating the costs of notifications about received reserved material;
  - when accessing the students reference database.

**V10.0, 18–19 June 2022**

- In cash register operations, the option of deleting debts was replaced with the option of writing off debts:
  - the methods that are related to deleting debts were renamed: **Delete debt** to **Write off debt** and **Batch deletion of debts** to **Batch write-off of debts**;
  - the privilege *CRO\_DEL – debts deletion* was renamed to *CRO\_DEL – debts write-off*;
  - transaction *2 – deleting debt* is no longer recorded; instead, transaction *6 – writing off debts* is recorded;
  - transaction *2 – deleting debt* was renamed to *deleting debt (until version 9.0)*;
  - the term *Reason for debts deletion/write-off* was changed to *Basis for debts write-off*.

The procedures have not been changed; the privileges, required for their execution, have also remained the same.

When writing off debts it is mandatory to state the reason for the write-off (decision of the competent authority with the number and date of the document), which you enter to the local code list *Basis for debts write-off (CODE 317)*.

- It is no longer possible to write off a debt that was entered based on the cancellation of a debt payment. Such debts can be written off using the method

**Entered debts / Batch write-off of debts**, which can be done by an authorised person at the library.

- In the **Entered debts** class, the new method **Send notification on outstanding debts** was added, which is used to inform members on their outstanding debts. In the **Finding members with entered debts** window, enter the parameters that should be taken into account when including members (amount due) and debts you wish to display in the member notifications (period of debts creation). You can decide if the amount due relates to the total debt of each member (regardless of the period of debts creation and the department where the debt was recorded) or just to the amount of debt recorded in a selected time period. In the last case, place the tick in the checkbox **Amount due relates to the debts entered in the selected period**. In libraries with departments, you can make selections for the **Library department** parameter to prepare notifications on unsettled debts for all departments or just for a selected department. For the parameter **Method of notification**, you can select from sending notifications on unsettled debts only to those members, for which the e-mail address for e-notifications is entered (option *E-mail only*), the members with an entered e-mail address will be sent the notification by e-mail, and the others by regular mail (option *By e-mail, the rest by regular mail*), or all members will be sent the notification by regular mail (option *Everything by regular mail*).

This method replaces the notification of members on unsettled debts with the reports *LOAN-Mb-10: Notification about outstanding debts* and *LOAN-Mb-13: Notification about outstanding debts (to be sent by mail)*, which are no longer used (folder *Loan / Lists / Members*).

- In the **Entered debts** search window, the search fields were updated with the option of searching by membership card number, turnover type for VAT return, calculation method and the person who entered the debts. This data is also included in the display of attributes of this class.
- The procedure for batch writing off debts (**Entered debts / Batch write-off of debts**) was updated so that during the procedure, the report *List of written off debts* is prepared automatically, with all the data on the debts that were written off. The list is intended for the accounting department so that they can arrange the accounting records accordingly.
- When automatically recording debts, the discount rate is displayed in brackets after the service price, if it is specified for this debt/service in the list of valid discounts.
- In cash register transactions, additional data is recorded, which is why the cash register transactions search window (**Entering and settling debts / Transaction**) was updated with the display of this data. The display of attribute values in this class was also updated.
- In the archive on invoices, which is accessible by using the object method **Invoice / Archive** or **Credit note / Archive**, the selected document is displayed in PDF format but cannot be printed.
- The non-cash payment type *02 – Moneta* was renamed to *02 – VALÚ Moneta (up to version 9.0 Moneta)* due to changes made to this payment method.



- In cash register transactions, transaction 5 – *payment transfer* was removed as it is not recorded any more.
- The methods **Member / Updating member data – import** and **Member / Updating member data – export** were updated so that it is possible to select e-notifications by e-mail or SMS. The same conditions are taken into account as when manually selecting e-notifications for the member in the **E-notification** window in the **Member** editor (the e-mail address or mobile phone number for e-notifications is entered for the member and the selected e-notification type is enabled on library level).
- If pickup locations are activated in the library and the library also enables members to pick up material from a parcel box, and if the link between COBISS3 software and the application of the parcel box provider for collecting deliveries is established, when calculating the reservation expiry date for a reservation with the status *W – waiting on shelf (reservation)*, the parameter *wait.* from the time parameters table is not taken into account, as the default value for collecting the material from the parcel box is 72 hours (this date is defined by the parcel box provider application). If the library wishes to change the time when the material is waiting for the member in the parcel box, a written request must be sent [podpora@izum.si](mailto:podpora@izum.si).
- On the report *Lending form for newly received reservations*, the pickup location is displayed in bold and in larger font (applicable to libraries where the parameter for specifying different types of sorting data on this report is activated).
- On the report *Send to pickup location*, the information on the reservation is displayed in larger font and before the information on the pickup location, to which the material must be sent.
- For the member's mailing address, it is possible to define the new type of use of the mailing address, i.e. *material delivery*. It is used in libraries that enable home delivery of material for their members. The address for material delivery is defined by the member in My library.
- The new report *LOAN-Mt-11: Material with no. of transactions by copies* was prepared, which enables preparing statistics on the number of transactions by individual copies for the selected material.
- Bug fixes:
  - when creating the link between invoice and credit note;
  - when returning material that was on interdepartmental loan from the mobile library department;
  - when saving the report *LOAN-Mt-07: List of material without transactions / with transactions (by title)* as a .txt file;
  - when manually changing the due date by entering the period, if the change is taken into account for material, borrowed from different departments;
  - when returning material in another department with self-checkout, if the material is reserved in the return department;
  - when returning material in another department, if the material is reserved and will be collected from a parcel box;

- when recording the data on the pickup location in transactions *36 – taking over the reservation of available material for processing* *37 – ending the reservation processing of available material*;
- when recording the return of material that is reserved and will be collected from the department where it was returned.

#### V9.1.1, 14 May 2022

- In libraries with the activated option of pickup locations, a software control was added in the **Home library material** window. If, when changing the pickup location, you select a pickup location for material delivery, the software will check if the member's e-notification data contains a mobile phone number. If the mobile phone number is not entered, a message is displayed and the selection of a pickup location for material delivery is not possible. The software control is also activated in COBISS+ (when reserving material, the user cannot select a pickup location for material delivery, if there is no mobile phone number in the e-notification data).
- In libraries where the option of pickup locations is activated, when returning material on interdepartmental loan in the host department, if the material is reserved in the parent and the host department, both reservations are processed automatically, if you do not appoint the material to the member in the host department. The material you are returning is then automatically appointed to the member in the parent department – the member's reservation of unavailable material (status *R*) – depending on the pickup location – changes to a reservation of available material with the status *O* (the reservation gets the status *in process*), or with the status *W*, and moves to the return department. At the same time, the software checks the holdings for this material in the host department:
  - if there is an available copy that is available for loan, it is automatically appointed to the member with the reservation in the host department – the reservation of unavailable material (status *R*) changes to a reservation of available material with the status *O* (the reservation gets the status *received*);
  - if there is an available copy that is not available for loan, the member's reservation of unavailable material (status *R*) does not change;
  - if there are no available copies in the host department, the member's reservation of unavailable material (status *R*) in the host department is deleted (a message is displayed on the screen).
- When selecting the registration form for the member, who, according to the entered data, can be classified as a foreign national (member category *013 – foreign nationals* or *foreign nationality* or *country of permanent or temporary residence is foreign*), the English registration form is set as default even if the signatory pad is not connected.
- Bug fixes:
  - when changing the reservation of available material to a reservation of unavailable material and when automatically appointing another available copy to the member, if you lend the reserved copy to another member;

- when returning material from the mobile library department to another department, if the material is reserved in the parent department;
- when returning material on interdepartmental loan in the host department, if the material is reserved in the parent department and the host department and when the material is returned, you do not appoint the material to the member with the reservation in the host department;
- when calculating the reservation expiry date for material with the status *W – ready for delivery*;
- when returning material on interdepartmental loan in the host department in the case of a cancellation of appointing the material to the member with the reservation in the host department;
- when transferring the mailing address of a superior member when registering a member with the category *125 – legal entities – ext. institutions*.

### V9.1, 16–17 April 2022

- Now the discount is taken into account also in case of online payment of debts. In the list of debts in My library under the **Debts, restrictions** tab, a column for displaying the discount is added, whereas the discount price appears in the **Amount** column. In order to get the discount, the online payment must be carried out during the discount validity period. If the library does not enable online payment of debts, it is possible to get the discount during the discount validity period only when settling the debt in the library.  
If membership fee discount is valid only for a limited period of time, it is recommended to supplement the text of the e-mail message that a new member receives after online registration with the note that payment must be carried out while the discount is still valid. For this purpose, the variable **Confirmation on online registration – note** in the folder **Standard / Loan / Report variables / Online registration** can be used. You can change the default value by copying the variable to user variables, where you can modify the text as appropriate.
- Entering and settling a debt with a discount of 100% made possible; also in case of a discount of 100% it is necessary to enter the payment while the discount is still valid.
- Bug fixes:
  - when notifying members about unsettled debts with the report *LOAN-Mb-10: Notification about outstanding debts*;
  - when cancelling the reservation of material in My library if the material is reserved through interlibrary loan;
  - in relation to the reservation validity expiry date with the status *W – waiting on the shelf (reserved)* if the material will be picked up from parcel box connected with the COBISS3 software;
  - when processing the reservation of the material with the status *received (self-checkout)*.

**V9.0.1, 11 April 2022**

- Bug fixes:
  - when batch deleting expired reservations of available material;
  - when returning a set in another department and not in the department it was borrowed from;
  - when returning material on interdepartmental loan that was reserved as unavailable material in the parent department;
  - when setting the reservation status when returning reserved material at self-checkout;
  - when searching in the window for selecting a debt when entering a debt.

**V9.0, 2–3 April 2022**

- The window for editing the calendar was changed (**Home library / Calendar** method or **Department / Calendar** method). In addition to a new look, it now enables also:
  - Split the calendar into:
    - the calendar where you specify if the library is open or closed,
    - the calendar where you specify if on the days when the library is closed, the overdue fine is charged or not;
  - simultaneous display of all days in a year (only three months up to now);
  - easy movement between calendars for each year and the calendar with days when the library is open/closed, and the calendar with the days when the overdue fee is charged;
  - in libraries with departments, it is possible to switch between calendars of each department from the *Home library* calendar.

Setting the days when the library is open/closed for the past is disabled. From the installation of COBISS3 V9.0 onwards. It will only be possible to define a day in the past as closed, and only upon the library's written request.

**NOTE: It is important that you check if the calendar is set up correctly for past days before the installation of the new version of COBISS3 software.**

The other calendar functionalities remain (selecting one or several days at the same time, defining a day/week as closed for the entire year, etc.).

- The functionalities of home delivery of material and the automatic calculation of delivery costs are supported by the software. The functionality can be activated upon the library's request.
 

**NOTE:** It will be possible to use this functionality once the new version of COBISS+ is installed, when the members, when reserving material in COBISS+, will be able to select a pickup location in those libraries that will enable this functionality.
- It is possible to automatically calculate the costs of picking up material at the selected pickup location. In order for this option to work, you have to set the cost calculation rules in the new local code list Calculation of material pickup cost (CODE 329) and edit the settings in the price list. The pickup costs are also displayed next to COBISS+ next to the pickup location where it is possible to collect the copy.
- The highest possible number of loan period renewals is 30.

- For reservation processing spots, the **To pickup loc.** method was added to the reservation processing methods. This method can be used before sending material to the pickup location. Use to it to mark a reservation when the material is ready to be delivered to the pickup location (to another department, from the closed stacks to the reading room or the lending desk, etc.). You can use it for reservations with the status *received*, *received (priority)*, *received (self-checkout)*, *in process* and *processed*. By using this method, the status of the reserved copy changes to *on its way to pickup location* and the transaction 42 – *on its way to pickup location* is entered. The status of the reserved copy in loan (*O – reserved available copy*) does not change. You can use the user settings to define that when you select this method, the lending note for newly received reservations is printed at the same time and add it to the copy before sending it to the pickup location.

**NOTE:** Users that wish to use this method when processing reservations must place a tick next to the **To pickup loc.** method in the user settings for the reservation processing spots.

**NOTE:** In libraries with activated functionality of pickup locations and a link between the COBISS3 software and the parcel box provider app, for the material with RFID labels the use of the **To pickup loc.** method is mandatory.

- A software control when cancelling reservations through COBISS+ was added. If the library enables the cancellations of reservations of material with the status *O – reserved available material*, the reservation of material with the status *O – reserved available material* can no longer be cancelled, if the material is already of its way to the pickup location (the reservation has the status *on its way to pickup location*).
- The reports *Slip with reservation details*, *Slip with reservation details (without member notification upon the library's decision)*, *Slip with reservation details – self-serve collection* and *Slip with reservation details (without member notification upon the library's decision) – self-serve collection* now also include information about the pickup location (in libraries where the pickup location functionality is activated).
- In libraries where the functionality of pickup locations is activated, the option of collecting material from a parcel box is supported. Processing reservations of material that will be collected from the parcel box depends on whether the link between the COBISS3 software and the application of the parcel box provider is activated. If this link is activated, **do not prepare the material for pickup** at the pickup location for the parcel box.

**NOTE:** The link between the COBISS3 software and the application of the parcel box provider is activated based on the library's written request. Once it is activated, the settings are defined in agreement with the library.

- Due to the upgrade of the pickup location functionality (option of collecting material from the parcel box and delivering material to the desired address):
  - The method **Prepare material for pickup** in the class and object **Pickup location** was renamed to **Prepare material for pickup or delivery**;
  - the method (button) **To shelf (W)** in the window with the list of reservations at the reservation processing spot and the pickup location was renamed to **For pickup** (at the pickup location, *material delivery* changed into **For delivery**);

- the reservation status *waiting on shelf (W)* in the window with the list of reservations at the reservation processing spot and the pickup location was renamed *ready for delivery*;
- the display *reservations with status W* in the window with the list of reservations at the reservation processing spot and the pickup location was renamed to *reservations of material ready for pickup*;
- the display *cancellations of reservations with status W* in the window with the list of reservations at the reservation processing spot was renamed to *cancellations of reservations of material for pickup*.
- In libraries where the functionality of pickup locations is activated, the option of limiting ordering material to pickup location is activated based on the content of subfield 996/7d\|f – *Format*.
- In libraries where the functionality of pickup locations is activated, a software control was added in the **Home library** window. If you change the pickup location and select the pickup location for the parcel box and the link is activated for the library between the COBISS3 software and the application of the parcel box provider for parcel collection, the software will check if the mobile phone number is entered in the member's e-notification data. If the number is not entered, a message is displayed and it is not possible to select the parcel box.
- In libraries with departments where functionality of pickup locations is activated some changes were implemented when returning copies on interdepartmental loan when there are reservations for this material in the parent department and/or return department in order to speed up the process. The reservation processing spot is now in the return department and the status of the material depends on the pickup location for this reservation.
  - If the material will be collected from the return department, the reservation *R – reserved unavailable material* changes to reservation *W – waiting on the shelf (reservation)*. When changing the reservation, the *Slip with reservation details* is printed and the member is sent a notification about received material (in accordance with the notification mode they selected in the e-notification settings).
  - If the material is not collected from the return department or if the material is reserved through interlibrary loan, the reservation *R – reserved unavailable material* is changed automatically to *O – reserving available material* (the reservation status is *in process*). When changing the reservation, the *Send to pickup location* report is printed, which includes the information about the department the material will be sent to, and the data on the member (or customer in interlibrary loan) for whom the material is intended. Before you send the material to the pickup department (i.e. parent department or another department), you can process the reservation with the **To pickup loc.** method.

If the material you are returning does not belong to the return department or is not on interdepartmental loan to this department, interdepartmental loan is recorded automatically from the parent department to the return department; in



case of interdepartmental loan, interdepartmental return is recorded automatically beforehand.

When the reservation of unavailable material (status *R*) changes to a reservation of available material with the status *O* or *O – through ILL*, the slip *Send to pickup location* is printed with the information for whom the material is reserved.

- In libraries with departments, when returning material on interdepartmental loan that is then returned to a department that is neither the host department or the parent department, and interdepartmental return is recorded automatically, and at the same time, the material is recorded as retained in the return department.
- The layout of the windows in cash register operations was changed:
  - in the **Debts settlement and entry** window in libraries with departments, the list of all debts of the member is visible regardless of the login department, the option of selecting a department was removed;
  - the time of entering debt in the list of debts was moved to the third spot;
  - the alignment of values in each column is now uniform based on the type of data (e.g. cash values are right-aligned, text is left-aligned);
  - the button size is now uniform, and tooltips were added for the names of methods.
- When entering debts in libraries where the COBISS3-SAP link is activated, the data required for entering debts settlements in SAP is now recorded also in the automatic debt entry.
- When charging for services and goods, in accordance with the rules of rounding up interim operations before the final amount that has to be paid for the services/goods by the library visitor, all amounts are calculated and displayed rounded up to a hundredth.
- A control was added that when you select all material on loan for return with restriction in the **Home library** window, it requests an additional confirmation of the return of all material with restriction.
- The option was added to receive messages about the current state of the incoming reservations in loan and incoming interlibrary loan request. To subscribe to these messages, select **Message for newly received reservations and ILL orders** in the system settings (**System / Settings**) and then use the tick in the **Sign up to receive messages about newly received reservations and ILL orders** window to indicate that you wish to receive these messages. The message is displayed in the browser status bar every time the counter changes in approximately 5-minute intervals.

It consists of:

- the department designation (in libraries with departments), e.g. **Dpt. 01**;
- **MOR** = number of reservations of available material, for which the reservation status is *received*; the number matches the total number of received reservations at the reservation processing spots in the department you are currently logged into;
- **MI** = the number of received ILL requests (COBISS3 and COBISS+).

The setup of receiving messages is related to the username and on whether the user has permission to work in loan and/or interlibrary loan. The message is also



displayed when logging into COBISS3 if there are unprocessed reservations on the received reservations list (the reservation status at the reservation processing spot is *received reservation*) and/ or there are incoming ILL requests (COBISS3 or COBISS+). In libraries with departments, the message is also displayed when switching departments.

- In the **Catalogue**, the option was added to save search requests in the form of a query that can be used later. The **Save query** button was added just below the Last search button for this query. When you wish to re-use the saved query, select it from the drop-down list next to the **Save query** button and click **Find**.
- Signature pad (**Home library / Text for signature pad** method):
  - It is possible to select the language on the signature pad even when, based on the data (member category *013 – foreign nationals or foreign nationality or country of permanent or temporary residence is foreign*) the text would be displayed in English;
  - it is possible to adjust the font size on the signature pad.

These options are activated based on the library's written request.

- Upon the library's request, it is possible to use a special parameter in My library to extend a loan period that had already expired. Extending an expired loan period is only possible if there aren't any other restrictions that would make the renewal impossible (e.g. outstanding debts).
- The **Member / Entering/updating members details – school libraries** method was updated with the option of entering the RFID card number.
- The **Member / Update member details – export** method and the **Member / Update member details – import** method were updated so that it is possible to enter an e-mail address for e-notifications. If there is already an e-mail address for e-notifications in COBISS3 and the file contains a blank value, the existing e-mail address remains in COBISS3.
- In the **Entering material to or from reading sets** window, the control for ASCII characters was included for the options of printing barcodes on the lending note printer. For each part of the serial, if it contains an incorrect character, only the accession number and a comma are displayed – similarly to when an entry of a part is too long in subfield 997m.
- In the viewer of the **Unavailable material** class, the **Cover** button was added. Once you click on it, the cover for the currently selected material is displayed. The cover is not displayed if it does not exist in COBISS+ yet. The update with the special parameter is already activated in those libraries that have the **Cover** button in the **Home library material** window and the **Catalogue** window.
- If in the library's settings for printing lending notes and invoices (**Home library / Create lending forms and invoices**) it is set up that unsettled debts should also be displayed, the amount of current overdue fees is now displayed independent of existing unsettled debts for the member.
- In the related objects for the **Member** class, the **Notifications** folder is still displayed even if the member has no notifications. Next to the folder name, (...) is displayed instead of the number of notifications. Once you click on the folder, the list of notifications for the selected member is displayed (if there are any).

- The **Notification / List of undelivered notifications** method was changed and renamed to **Undelivered e-notifications**. It is now possible to re-send undelivered notifications. It is recommended to use this method on the same day when the notifications were created but only after the process of daily morning member notifications is complete.
- Two new reports were prepared:
  - *LOAN-EXP-07: List of members' debts (expanded)*, in which more data on the members and their debts as well as notes on the member (at the end of the report) are displayed);
  - *LOAN-Mb-13: Notification about outstanding debts (to be sent by mail)*, which allows the members to be informed about their outstanding debts by mail, regardless of whether the member's e-mail address for notifications is entered or not.
- In the statistics *LOAN-STA-T01*, *LOAN-STA-T02*, *LOAN-STA-T03*, *LOAN-STA-T12*, *LOAN-STA-T24*, *LOAN-STA-T27*, *LOAN-STA-T31*, *LOAN-STA-T32*, *LOAN-STA-T33* and *LOAN-STA-T34* the new query parameter "Provider/portal" was included. The statistical report can be prepared for a specific provider of online resource, e.g. *biblos*, *audibook* or *filmoteka*.
- The new code *lk* – *USB key* was added to:
  - the table of subfield combinations to determine the physical form available at the link [Rules for defining the physical form of material](#)
  - classification *physical form\_2* (*video, audio recordings, e-resources*)
  - classification *physical form\_4* (*book, non-book (detailed)*)
- Bug fixes:
  - when including a new department, the settings related to the library department remain intact;
  - when specifying the pickup location for material in sets;
  - the main display on the **Member** object was updated with the data on the member group;
  - the display of data on the material in the notification about a forthcoming loan period expiry date was updated so that the material title and author(s) are displayed in full;
  - when editing the settings for the operation restrictions *Lending period by member category*;
  - for the remote access conditions for members;
  - when selecting the mobile library stop, if the mobile library department is marked as the default login department;
  - when sorting the transactions code list, if the parameter for automatic sorting of codes in local code lists is off;
  - when sending or previewing the report *LOAN-Mb-10: Notification about outstanding debts (mail, parameter for total debt)*;
  - when dividing the text on the signature pad into individual pages;
  - when displaying the information on the estimated date when the material will be available in the **Catalogue** window;

- for the name of the registration form in the message when sending the registration form to the member's e-mail address;
- when entering the return of material on interdepartmental loan, if the member returning the material also has a reservation for this material in another department;
- when copying cells in the window with the list of reservations at the pickup location.

#### V8.0.11, 26 February 2022

- Bug fixes:
  - the error that occurred when displaying the library department in COBISS+ was fixed;
  - when deleting a lost copy from the member's records, if there is a list of reservations for this material and there are other available copies without restrictions, which are available for loan, or if there are no other copies for loan available without restrictions;
  - when returning reserved material with the status *4 – in revision*;
  - when returning serials with bound issues;
  - when viewing the list of items for which a discount applies.

#### V8.0.10, 12 February 2022

- Bug fixes:
  - when entering the return of material to another department, if the material is also reserved in the parent department;
  - when deleting a lost copy from the member's records, if there is a list of reservations for this material and there are other available copies without restrictions, which are not available for loan;
  - when renewing the membership, if the membership validity period is longer than 3 years.

#### V8.0.9, 26 January 2022

- Activation of software support for the option that the invoice is printed upon the library member's or visitor's request. Up until this point, it was mandatory to hand out a printed invoice. The update was prepared in accordance with the V Act Amending the Value Added Tax Act (ZDDV-1M), published in the *Official Gazette RS* No. 3/2022 on 7 January 2022, taking effect on 22 January 2022.
- Bug fixes:
  - the error that occurred when viewing loan parameters related to e-notifications was fixed;
  - when recording material on interdepartmental loan in the parent department, if the material is also reserved in the parent department;
  - when deleting material from the material records for the department (copy on interdepartmental loan that was returned in another department), if, once the

material is delivered to the department where the material was borrowed, you do not wish to appoint the material to the member with a reservation;

- when viewing settled debts.

#### V8.0.8, 15 January 2022

- In libraries with departments, when returning material on interdepartmental loan in the parent department, if there are already reservations for this material in the parent department, the return of for the member in the host department is recorded automatically, the interdepartmental loan is resolved, and the material is appointed in the parent department to the member who is at the top of the reservations list (the status changes from *R* to *W*). If the library has the option of pickup locations activated, the reservation *R – reserved unavailable material* for the member at the top of the reservations list changes:
  - to reservation *W – waiting on the shelf (reserved)*, if the member will collect the material from the parent department,
  - to reservation *O – reserved available material*, if the member will collect the material from another department (close the processing of such a reservation and deliver the material to the pickup location),
  - to reservation *O – through ILL – reserved available material*, if a reservation for interlibrary loan is at the top of the reservations list.
- Bug fixes:
  - when lending a copy on interdepartmental loan, the message about reservations in the parent department is no longer displayed, if the material was appointed to the member by the librarian when recording the return in the host department despite there being reservations in the parent department;
  - when borrowing a copy on interdepartmental loan using the self-checkout in case of a self-checkout material collection (the material was appointed to the member by the librarian when recording the return in the host department despite there being reservations in the parent department);
  - when automatically creating reservation processing spots;
  - when lending material on interdepartmental loan in the mobile library department.

#### V8.0.7, 4 January 2022

- The message when returning material on interdepartmental loan in the host department in case of additional reservations in the host department was updated.
- Bug fix:
  - when displaying holidays in the calendar.

#### V8.0.5, 21 December 2021

- Bug fixes:
  - when taking into account the condition for the publication year (content of subfield *100c – Publication year 1*) at the material pickup location (in libraries that have the option of pickup locations activated);

- when deleting a member with web resources on loan (e-books, audiobooks, etc.);
- when taking into account the discount for overdue notice items.

#### V8.0.3, 6 December 2021

- Bug fix:
  - when borrowing material based on the loan number.

#### V8.0.2, 4 December 2021

- For libraries, in which the COBISS3-SAP link is activated, it is possible to set up whether the data is transferred to the SAP test environment or the SAP production environment.
- Bug fixes:
  - When selecting the member;
  - when searching by transactions by two of the same attributes, e.g. two different accession numbers;
  - when displaying the publication year in the notification about a forthcoming loan period expiry date;
  - when sending lending forms to the e-mail address of the guardian/guarantor.

#### V8.0.1, 29 November 2021

- Bug fix:
  - when borrowing material of the type *other*.

#### V8.0, 27–28 November 2021

- When setting the loan period, a new functionality was added which enables setting the loan period for each member category. For the **Home library / Restrictions on operations** method, select the new restriction **Lending period by member category** and for the categories, for which the loan period is different to the one defined with the loan time parameters, enter a different loan period.
- For libraries that use a joint members' database (KISUM, libraries of the Biotechnical faculties), the registration forms are saved to the joint members' database. This means that in every library within the joint members' database you can use the **Member / Archive of e-documents** option to view all the registration forms of a member regardless of where the member signed them. When introducing this functionality, we also transferred all existing registration forms to the joint members' database.
- In the browser window, the option of using the <P> key on the keyboard was added for the **Field 996/997 / View** class method.
- Loan of equipment:
  - In the toolbar you can add a hotkey for the **Unavailable equipment / Return, delete** method.
  - You can now leave the **Entered equipment** window by using the <Esc> key.

- If, in the members details, there is a tick next to **In recovery**, when moving to the **Home library material** window, a message is displayed that the member is in the process of recovery.
- In the **Home library material** window, the indicator PSH is displayed if the member activated receiving at least one type of push notifications.
- Loan time parameters:
  - The time can also be entered in weeks (e.g. 3w for 3 weeks).
  - When entering the time of the loan period, renewal, reservation validity and duration of reservation validity for reading room use, it is checked if the time entered is defined within a year for which the calendar doesn't exist. The current limit is three years from the current year onwards. This control is also valid when defining the loan period for individual member categories.
- In the processes of recording material when calculating the expiry date (e.g. loan period expiry, reservation validity period, etc.) it is checked if the calendar exists for the year for which the expiry date is defined. The control is also performed when changing the expiry date. If the calendar does not exist, a message is displayed. In such a case, the library must save the calendar for the year, in which the validity period of the status of the entered material expires, or manually change the expiry date to a year, for which the calendar exists. It must be taken into account that the library can only define the calendar for three years in advance.
- For the purposes of transferring data on issued invoices in COBISS3/Loan, a link was established between COBISS3 and SAP software. This option is activated upon the library's request following a prior agreement on the required settings.
- The methods **Member / Update member details – export** and **Member / Update member details – import** are updated so that it is possible to add a note to the existing member notes. When exporting selected members with the **Member / Update member details – export** method, two columns appear in the Excel file (if you select the existing notes for export): **Existing notes**, where the existing member notes are exported and are separated by semi-colons, and **Note – additional**. You can enter an additional note for the selected members in the **Note – additional** column. Once you use the **Member / Update members details – import** method, the note from the **Note – additional** column is added to the existing notes for each member. When importing the data of members for updating, you must select the **Note – additional** attribute.
- Based on experience acquired at the beginning a new school year, the **Member / Entering/updating members details – school libraries** method was renewed and updated for school libraries. The most accuracy when using this method is still ensured by entering the date of birth for new and existing pupils and students.
- For libraries that use RFID, the display of the number of copies of material on the RFID control panel was added for the methods **Unavailable material / Return, delete** and **Unavailable material / Return with restriction** in the **Search by key** window.
- Upon the request of libraries that use RFID, when selecting the buttons **Lend, Return, Retain** and **Reserve** in the **Home library material** window, it is checked if

there is a RFID device, and, if there is one, the selected transaction is performed automatically. You can also continue working as before and select the **Scan RFID** button first and then the button for the required transaction, e.g. **Lend**.

- For libraries that use membership cards with RFID technology, for the **Member / Search by key** method after using the **Scan RFID** button in the **Search by key** window, the member is transferred to the workspace immediately. When using the **Member / Home library material** method, after using the **Scan RFID button** in the **Search by key window**, the **Home library material** window opens immediately.
- In the **Home library material** window, for reserved unavailable material (status *R – reserved unavailable material*), the date after which the material is available will be displayed along with the member's place in the reservation queue. The data is displayed in the 6th column (**R/RA/L/RR**).
- In the **Catalogue** window, in the list of search results for the borrowed and/or reserved copy of material, the additional information on the presumed date after which the material will become available is now displayed. The data is displayed in the 1st column after the display of the total number of reservations.
- When preparing overdue notices, you can use the option of preparing overdue notices for sending to the member's e-mail address even when you prepare overdue notices in XML-form. When sending overdue notices, firstly the file with e-overdue notices is prepared, followed by an XML-file for those members with overdue notices without a registered e-mail address.
- When you finish preparing overdue notices, the statistics on prepared overdue notices will now also include the information, how many overdue notices were prepared for sending by e-mail and how many for printing on the printer. After each overdue notice number in brackets under *e-mail*, the number of overdue notices prepared in the form of an *e-overdue notice* is displayed, and under *mail*, the number of overdue notices, prepared in one of the following forms is displayed: *A4 format, multi-layer carbon copy envelope* or *XML overdue notice*.
- When processing a reservation of available material that belongs to the mobile library and the member will pick it up at another location, the transfer of material from the mobile library is performed automatically when appointing the material to the member. The transaction *9 – return of material from the mobile library location* is recorded. In case of a reservation of available material that the member will pick up at the mobile library and it does not belong to the mobile library department, when appointing the material to the member, the transfer to the mobile library is performed automatically. The transaction *8 – placing material to the mobile library location* is recorded.
- In the **List of reservations and cancellations of available material** window, the **Status (q)** attribute was added to the data displayed in lists. Including this attribute to the display in lists enables you to immediately see if a status was defined for the reserved copy in subfield **996/997q** (e.g. *5 – relocated*).
- In the **List of reservations and cancellations of available material** window, the drop-down list of possible displays of reservation lists was extended so that all lists are visible now.



- In the list of attributes that is displayed in the search window for members on the workspace, the **E-mail (not for e-notifications)** attribute was added. For this attribute, all e-mail addresses for the member are displayed that are entered on the **Addresses** tab. To display this attribute when searching members in the **Search – members** window, it must be added to the attributes for displaying search results (**Member / Hit list formats** window).
- In the members details editor, in the **E-notification** window under **E-mail** it is possible to copy only a part of the content without overriding the existing content.
- In the warning that is displayed when returning material that is on interdepartmental loan and for which there are reservations both in the host and the parent department, now, in addition to the details on the member with the reservation in the host department, the data on the member with the reservation in the parent department is also displayed. The display of data on reservations was updated with the data on the reservation date and pickup location (if it exists). By doing so, the person at the lending desk can decide whether to assign the material to the member with the reservation in the host department.
- A software warning was added, which is displayed when you record the return of material in the host department, for which there are no additional reservations in neither the host department nor the parent department.
- When marking a reserved copy of material as missing (**No material** method) and automatic entry of a reservation of another available copy, from now on, this copy:
  - retains the same reservation status as the reservation of the initially reserved copy before it was marked as missing, if this reservation had the status *received* or *received (priority)*;
  - gets the status *received*, if the reservation of the initially reserved copy before it was marked as missing, had the status *received (self-checkout)*, *in process* or *processed*.
- If, while you finish processing a reservation (**End processing** method), you enter a copy other than the one that was reserved, an automatic warning is displayed, and the software will offer to mark the previously reserved copy as missing.
- In libraries that enable their members pickup of material at different pickup locations, the attributes "Reservation status", "Label for the reservation processing location" and "Label for the material pickup location" were added to the default display of search results, to the list of attributes in the browser, to the list for defining search results displays and for the list of data for export in the **Unavailable material** class.
- The new report *LOAN-R-07: Reservations of available material at the pickup location – by reservation processing location (by reservation status)* was prepared. To print the list of reservations at the selected pickup locations, select the desired display in the **List of reservations of available material** window, select the reservations you wish to include in the list, and then click the **List** button. The reservations in the list are sorted by reservation processing locations and reservation status.

- In libraries that enable picking up material at pickup locations, the new transaction *40 – change of pickup location* is recorded if the librarian changes the pickup location in the member's reservation.
- In the notification about received reserved material that the member receives by e-mail, the information about the pickup location is displayed in a separate row.
- In the notification about a forthcoming loan period expiry date that the member receives by e-mail and in the report *LOAN-MM-05: Notification about a loan period expiry date (e-mail)* the data on material is updated with the display of the publisher and the full title of the material. The individual details are now displayed in separate rows, and in full instead of the index so that the library members can understand them easily. When creating the report LOAN-MM-05, the *Membership card number* parameter was added which enables you to send the notification to a selected member.
- In the report *LOAN-Mb-05: Change of data for members*:
  - the following input parameters were added: *Member ID*, *Membership card number* and *Username*.
  - for each change of data, the following is also displayed: username, time of change and type of transaction with which the data was changed.
  - when creating the report, the following transactions are also taken into account as the data changes: *52 – change of data via COBISS+ and mCOBISS*, *56 – membership renewal via COBISS+ and mCOBISS*, *6 – change of number* and *48 – transfer of member to another department*.
  - the legend of data changes was added in a separate form.
- The list of members with data for e-notification (**Electronic notification / List of members with data for e-notification** method) and the report *LOAN-Mb-12: Statistics of members signed up for e-notifications* were updated with the data on the number of members subscribed to e-lending notes.
- The new report *LOAN-MM-10: List of borrowed textbooks by departments/years* was prepared. The list only contains material from the textbook fund.
- When creating the report *LOAN-Mb-10: Notification about outstanding debts*, two new input parameters were added in the **Parameters** tab for defining the bottom and/or upper limit of member debt. The entry of these parameters is not mandatory. If you do not enter them, the report will be created as usual. Because of these changes, the report identifier changes. If the report *LOAN-Mb-10* is among your favourite reports, you have to delete it from the favourites list and add it again.
- Due to optimisation when creating the report *LOAN-Mt-08: List of material with the No. of all copies and loaned/reserved copies*, the columns Title and COBISS.XX-ID were joined in one column. The data is separated by a vertical line.
- Bug fixes:
  - for the class method **Department / Transfer transactions from offline application in mobile library**;
  - when entering a note on the copy;
  - for the operation of the **Last search** button in the **Catalogue** window;

- when checking for duplicates for online registration – it is checked if the members' database already contains a member with the same name, surname and date of birth;
- when refreshing the counter of registration numbers for online registration;
- when creating a job for updating members details for students according to the schedule;
- when sending e-notifications to underage library members, where the guardian/guarantor's e-mail address is also entered for e-notification;
- when deleting archived documents when deleting a member from the database;
- for reservations of material for reading room use;
- for reservations of material via COBISS+ if the copy of material is returned to a department other than the one it was borrowed from: the reservation is recorded in the parent department even though the material is currently at the department where it was returned (status *B – retained*), repeat reservation of the same material is no longer possible;
- when displaying a message for the reservation of material via COBISS+;
- for the reservation of material via COBISS+, if the library enables pickup of material at various pickup locations and the member reserves material via COBISS+ that is ready for collection in interlibrary loan;
- when appointing material for interlibrary loan when deleting a reservation of available material for the member of the host department, which is also the ILL department;
- when recording the return of material that the member ordered and collected in another department, but returned at the parent department, the message about return to another department is no longer displayed and the debt for return to another department is no longer recorded;
- for the initial settings in the window with the list of reservations of available material at the pickup locations;
- in the window with the list of reservations and reservation cancellations of available material at the reservation processing locations when displaying reservation cancellations;
- for interdepartmental loan of material from the same record, if you lend copies from several other departments to the selected department;
- when taking into account the calendar when calculating the grace period for returning material;
- when recording and displaying the data on the user who cancelled an invoice if it was not done by the same person who submitted the invoice;
- when calculating the estimated return date for material if the date is outside the scope of the calendar currently saved by the library;
- in the process of closing the cash register;
- when sorting the data on daily settled debts in the report LOAN-CRO-03: Summary of list of invoices incl. VAT on OS Linux;
- for the **Price list** window size;

- in the conditions for remote access of members;
- when borrowing a reserved set at the self-checkout.

#### V7.0.11, 30 October 2021

- Bug fix:
  - for procedures with documents in the electronic archive on OS Linux.

#### V7.0.8, 15 September 2021

- In the reports *Slip with reservation details – self-service collection* and *Slip with reservation details (without member notification upon the library's decision)*, the accession number is displayed in bold and in a larger font.
- Bug fixes:
  - in the joint members database when transferring an online registered member to another database;
  - system users cannot enter or edit the data on the pickup location;
  - when defining the pickup location, if the member reserves material via COBISS+ that was re-directed to another location or another department;
  - when displaying the postcode on overdue notices;
  - for the transaction note when recording the following transactions: *11 – outside loan*, *12 – reading room loan* and *30 – interdepartmental loan*.

#### V7.0.5, 14 August 2021

- In libraries that enable their members picking up material at several pickup locations, the option was added to enter new conditions for material collection (reservation restrictions based on the content of subfield *215d – Dimensions* and subfield *996/997p – Availability level*).
- The method for the class and object **Pickup location** was renamed to **Prepare material for collection** (previously **Process reservations of available material**).
- In the **List of reservations of available material window**, where the reservations at selected pickup locations are monitored, the displays *missing material* and *reservation cancellations* were removed from the drop-down list for selecting the display of the list of reservations.
- From the list of entered material that can be added to the invoice, the display of material, recorded for the member as retains (status *B – retained*) was removed.
- Bug fix:
  - when displaying the expected return date and the place in the waiting queue for material that was recorded as lost – the data is not displayed.

#### V7.0.4, 22 July 2021

- From now on, all e-mail addresses and telephone numbers, entered for the member in the **Addresses** tabs, are displayed on the registration form.
- Bug fixes:
  - when appointing a reservation in case of a return with restriction in a department other than the one where the material was borrowed, if there is also a reservation for the same COBISS.XX-ID in this department;
  - when automatically defining the pickup location when returning material with restriction in a department other than the one where the material was borrowed;
  - when selecting the display of reservation cancellations in the list of reservations at pickup locations;
  - when checking for duplicates when entering data into the **Members groups** attribute;
  - when displaying the current late fee for material in a set.

#### V7.0.3, 8 July 2021

- Bug fixes:
  - when preparing reports (data inclusion and sorting) of lists of invoices *LOAN-CRO-02* and *LOAN-CRO-03*;
  - when saving the days when the library is closed in the library calendar.

#### V7.0.1, 17 June 2021

- The display of the registration form in English, which is created during online registration if a special parameter is activated in the library, was updated with the signature.
- Bug fixes:
  - when displaying the data on the library/library department and the membership card number in push notifications;
  - when displaying a warning for a reservation when returning material with restriction.



#### V7.0, 12–13 June 2021

- If you wish to transfer a member to another department, use the new **Transfer of member to another department** method. This option is activated with a special parameter upon the library's request. To perform this procedure, the privilege for changing the library membership card number is required.  
To perform the transfer procedure, select the **Transfer of member to another department** method from the context menu on the selected member. The **Membership card** window will open, where you appoint a new membership card number to the member in the same way. Next, the member data editor will open, where the new membership card number is already displayed; the data for the **Department** attribute will also change – the current department is replaced by the

department to which the member was transferred. For the **Membership start date** attribute, the date is replaced with the date when the transfer was performed. The old membership card number is automatically saved to the invalid numbers. Next, change the remaining data for the member and update it, if necessary. If required, also print the label for the new membership card number. If the membership expired and the automatic membership fee calculation is set up, once the member record is saved, the software offers recording the debt for the membership fee according to the price list of the department where the member is registered. The debt can also be entered manually; you can also enter the data on the membership expiry date manually.

When saving the member record, the new transaction *48 – transfer of member to another department* is recorded. In the transaction data, next to the "Note on transaction" data, the following data is entered: *old membership card number; old department, old membership start date*.

When using this procedure, you have to consider the following:

- once you confirm the new number, you changed the membership card number and it is no longer possible to cancel the procedure.
- the old number cannot be appointed to a new member; if you use an invalid number for member identification, a warning is displayed.
- in libraries that will use the option of transferring a member to another department, special attention must be paid when preparing statistics on active members – these should be prepared separately by departments and membership registration departments.
- In the **Home library material** window, the size of the icons for Edit  and Show  was changed so it is easier to select them with a mouse. The option of using keys on your keyboard for opening certain windows has been added:
  - <Alt + E> – member data editor,
  - <Alt + M> – **Debts settlement and entry** window,
  - <Alt + Q> – **Entered equipment** window,
  - <Alt + N> – entering and editing the member note,
  - <Alt + L> – viewing entered material in other library departments.
- E-notifications that are sent to the members automatically before a specific condition is met (e.g. before loan period expiry) can be sent more than once, if the conditions for receiving e-notifications are met. Sending e-notifications repeatedly is possible for the following e-notifications:
  - forthcoming loan period expiry,
  - forthcoming overdue notice,
  - membership expiry,
  - outstanding debts.

Repeat sending can be activated with a special parameter upon the library's request. For the parameter you can specify when the repeat e-notifications should be sent. The repeat sending of e-notifications is performed based on specifying the number of days before or after a certain event. When repeat sending e-notifications you can specify, to which destinations the e-notifications should be sent again (e.g., only e-notifications by e-mail are sent again).

- The option was added for changing the text in the push notifications about a received reservation. For this purpose, the new variable **Additional text (push notif. about received reservation)** was defined in the **System / Loan / Variables / E-notifications** folder. The default value is *empty*, but you can change it by copying the variable to the user variables, where you can enter any text.
- In the push notifications about outstanding debts, the same text is now displayed as in the notifications sent by e-mail. This means that the default e-notification text can be changed, if you copy the system variables to the user variables and then enter the desired text.
- The procedure of processing reservations of missing material was updated. In the window for viewing and processing reservations of available material, you can now use the **No material** method for the following:
  - marking reserved material as missing,
  - closing the reservation processing for missing material.

#### Marking reserved material as missing

When you click the **No material** button in the window for monitoring and processing reservations of available material because you cannot find the reserved material in the spot where it should be placed, the reservation status changes to *missing material*, and the reservation of the copy is deleted from the material records for the member or for the ILL request. The status of the copy marked as missing does not change – the copy remains in the list of all reservations (status *O* or *O – through ILL*). The membership card number of the member for whom the copy was reserved before you marked it as missing (or the ILL request number and the user ID number, if the copy was reserved for interlibrary loan) is saved in a temporary note, entered for the unavailable material.

When marking a reserved copy as missing, the software checks if a copy without restrictions or a copy available for loan of this material is available:

- If there is one unconditionally available copy in the record, and that copy is available, it is reserved in the material records for the member or for the ILL request (status *O* or *O – through ILL*).
- If no other unconditionally available copy is available for loan, a warning will be displayed. In the material records for the member or for the ILL request, unavailable material is reserved (status *R*), and the member or ILL reservation are placed at the top of the list of reservations for this material. If the material was reserved by a member subscribed to e-notifications about received reserved material, the software will, when marking the copy as missing, also offer the option of notifying the member about the changed reservation. For notifications, the types of notifications are taken into account that the member selected for notifications about received reserved material (e-mail, SMS). If the copy was reserved for interlibrary loan, a notification about changing the reservation of available material to a



reservation of unavailable material is sent to the e-mail address for ILL when the copy is marked as missing.

- If there is no other unconditionally available copy available in the record, a warning is displayed. If the material was reserved by a member subscribed to e-notifications about received reserved material, the software will, when marking the copy as missing, also offer the option of notifying the member about deleting the reservation. For notifications, the types of notifications are taken into account that the member selected for notifications about received reserved material (e-mail, SMS). If the copy was reserved for interlibrary loan, a notification about deleting the reservation is sent to the e-mail address for ILL when the copy is marked as missing.

### Processing reservations for material marked as missing

To process a reservation with the status *missing material*, select the **No material** method again:

- If you cannot find the missing copy, delete the reservation, and mark the copy as permanently lost. The status *8 – lost* is automatically entered in the holdings data in subfield 996q, and the loan is disabled with the entry of the availability restriction *Od* in subfield 996u. If there is no other unconditionally available copy available in the record, the reservations for this material (reservations with the status *R*) are deleted for the members. The reservations for interlibrary loan are not deleted, but a notification is sent to the e-mail address for ILL that there are no available copies for loan.
- If you find the missing copy, delete the reservation. The copy becomes available for loan again, or, if there are other reservations, is appointed to a member or for interlibrary loan (transition from status *R* to *O* or *O – through ILL*).

**NOTE:** Reservations for material that was marked as missing before the installation of the new version of COBISS3 software are processed by deleting them from the material record for the member or for the ILL request.

- In libraries that enable their members the collection of material at different pickup locations, the option of editing the text (e.g. information about payment for the service if the material is collected from another department) that is displayed for the users when reserving material via COBISS+ when selecting the pickup location. To edit the text, use the **Home library / Contact details and information for COBISS+** window and enter the text for the attributes "Pickup location – note" and " Pickup location – note (English)" (**General and online registration** tab). The update is activated with a special parameter upon the library's request.
- In libraries that enable their members the collection of material at different pickup locations, a pickup location for interlibrary loan was added automatically, where reserved material for interlibrary loan is prepared for collection. From now on, it is no longer possible to prepare reserved material for interlibrary loan at the reservation processing spot, where the reservation for interlibrary loan was placed (not even in a library without departments for loan or a library with loan organised

by departments, even if the material reserved for interlibrary loan is from the ILL department).

**NOTE:** Reservations for interlibrary loan that were made before the installation of the new version of COBISS3 software will not be placed to the pickup location for interlibrary loan yet. The reserved material must still be prepared for pickup (**To shelf (W)** method) at the reservation processing spots where the reservations for interlibrary loan were listed.

- In the **Member** search window, it is possible to also search by special notes, if you use the **Keywords** search field. The update is valid for libraries with a common members database (e.g. KISUM).
- For departments, the option has been activated to reserve several copies of available material from the same record (COBISS-ID).
- For online registration, duplicate control was activated for members even in the case of different entries of the name and surname using fricatives and sibilants.
- The option was added to create a registration form for online registration, which is then saved to the archives of e-documents for the member who registered online. The registration form is also sent to the member's e-mail address, and in place of the signature, the text *Online registration* is displayed. The option is activated upon the library's request. It is recommended that a library that uses several registration forms, also specifies which form should be used for online registration when sending the request for the activation of this parameter.
- Libraries that use the registration form in COBISS3/Loan for signing the registration form, can now select, before printing the registration form (**Registration form** button in the **Member** editor), if the registration for the member should be prepared in their native language or English. This option is activated upon the library's request.

To design the registration form and the statements on the registration form in English, two new variables **Registration form name (English)** and **Member statement on the registration form (English)** were defined in the **System definitions / Loan / Variables / Registration form** folder. The default value for the first one is *Registration form*, and for the second one the value is *empty*. Both can be changed, if necessary, by copying them to the user variables where you can enter any text.

- The **Notification / Send special notification to e-notification recipients** method was updated so that it is now possible to:
  - include/select members that are subscribed to receiving all types of e-notifications,
  - also include those members, for which the e-mail is entered in the notification data, but they are not subscribed to receiving any e-notifications,
  - limit the selection criteria by the transaction department, in which the outside loan of material was entered,
  - send a notification only in the selected notification mode, so that it is only sent in the e-notification mode for which the notification was entered (until

now it was mandatory to enter the notification for all three type of notifications).

- The **Field 996/997 / Adding/removing material for reading sets** method was updated so that it is now possible to add serials to the reading set. With the use of RFID devices, it is now also possible to add several units at once to the material for reading sets. If you select the option **Add AN/LN to the list for the display of bar codes**, you can add only material for one reading set to the reading sets so that you can print the barcodes for one reading set.
- When calculating the expiry date for procedures for which the expiry date is calculated based on the time parameter settings and the calendar, the maximum expiry date can be defined as the last day of the year you can see in the calendar, i.e., the current year + 3 years (e.g. for the year 2021, this date is **31. 12. 2024**). If you wish to specify an even later due date, you must do it by changing the expiry date manually.
- In libraries with departments, in the **Catalogue** window for the field for the list of departments, the length of the field for displaying the department name was increased to 28 characters. The smallest possible size of this window was also increased so that all options enabled in this window are now visible in full.
- In the options for editing the content and the form of lending notes and invoices (**Home library / Create lending forms and invoices** method) and for the **Field for editing the selected data type**, the variable value *class/grade* was added, which enables adding this data to the lending form and invoice report.
- Signature pad (**Home library / Text for signature pad** method):
  - In the text that is displayed on the signature pad it is now possible to include e-mail addresses that are entered in the member data under addresses. You can do this by activating the variable *%emailAddresses%*. Only the e-mail addresses with a certain type of address will be displayed on the signature pad.  
It is also possible to include the display of the e-mail address of the guardian/guarantor that is entered in the member data for e-notifications. You can do this by activating the variable *%guardianEmail%*.
  - It is now also possible to display the text on the signature pad in English. The text on the signature pad (and with it the preparation of the registration form) is displayed in English, when the following conditions in the member data are met: member category *013 – foreign nationals* or *foreign nationality* or *country of permanent or temporary residence is foreign*. In all other cases the text is displayed in the domestic language.  
This option is activated based on the library's written request. When it is activated, all the required settings are arranged in cooperation with the library.
- If the library has the parameter activated that only enables the reservation of copies of material in COBISS+/mCOBISS to those members that are subscribed to receiving notifications about received reserved material, a warning will be displayed in the e-notification settings (**Home library / E-notification** method) when turning off all modes of receiving this notification.

- The calendar was updated. When you use the option for copying the settings by library departments, this option now allows to remove the days when the library is closed. The **Remove** method was also updated, so that now only the days selected for removal will be removed, and no longer all days when the library is closed together, if they were set up with the **Select all** option.
- The attribute "in mobile library" was added to the data set that can be displayed in lists for the **Monitoring and processing reservations of available material** method. Including this attribute in lists enables that you can immediately see if the reserved copy of material was placed in the mobile library or not.
- The window for entering or scanning the ID number of the copy when recording the material transfer to and from the mobile library remains active even after you change the selection for **deliver to mobile library** and **transfer from mobile library**.
- In the **Unavailable material** class, the **Process reservations** method and the **Prepare reserved material for collection method** were removed, as libraries already use the **Monitoring and processing reservations of available material** method for this purpose.
- In the local code lists for loan purposes, the following code lists were removed: *Masks (CODE 300)*, *Areas of interest (CODE 302)*, *Code list of occupations (CODE 304)*, *Status of student (CODE 305)*, *Category of university employees (CODE 309)*, *City (CODE 312)*, *Acronym (CODE 314)*, *Code list of reservation records (CODE 315)* and *Reservation processing spot (CODE 322)*, as they are no longer in use.
- In COBISS3/Reports, the folder **BibSiSt (NUK – CeZaR)** with the loan statistics for filling out the BibSiSt questionnaire was renamed to **BibSiSt (NUK)**.
- The new statistical report *LOAN-STA-T60: By department of return and material parent department* was prepared. It enables the preparation of data on how many copies of material were returned to a department other than the material parent department. The transaction *18 – return with restriction* is taken into account, which is entered when the material is returned to another department (category *126 – units for interdepartmental loan*).  
**Note:** In addition to returns, returns with restriction for material on loan are also included in the return statistics.
- The report *LOAN-Mt-08: List of material with the No. of all copies and loaned/reserved copies* is also accessible for the **Field 996/997** class. Use the **Find** method to find and select the fields 996/997, and then select this report from the list of report definitions.
- For the report *LOAN-CRO-04: Overview of payments (invoices, credit notes, cancellations)* the input parameter "Date" is mandatory data.
- Bug fixes:
  - when partly returning units from a set, for which there is a reservation;
  - for the activities of the **Return** button when switching to another department if the button was active before switching;
  - when displaying the status of the material in loan, if the material is retained in the department (status *B – retained*), when using the **View** method in the **Catalogue**, if you search by all departments (selection *all departments*);

- when taking into account the settings for outstanding debts on the delivery note;
- for the attribute **No. of visits per year** for a member who borrowed an online resource (e-book or audio book) or if he/she performed a transaction in COBISS+ on the same day before visiting the library;
- when entering a note on the transaction in the transaction file when interdepartmentally returning material with a restriction;
- when entering the return or return with restriction in another department for material with reservations in the material parent department or return department.

#### V6.28-00(06), 8 May 2021

- When returning material from another department at the self-checkout, the information on the calculated debt *Return at another department: xx.xx EUR* is displayed. On the report, the debt from the valid price list (item RET must be active – calculation type = automatic) is entered unconditionally, but only in those libraries that allow the return to another department and agree to the automatic debt calculation. In the remaining libraries, the warning *Material with IN/LN = xxxx is on loan in another department* is displayed when you attempt to return material from another department, and the material cannot be returned.
- When returning material at the self-checkout, the list of entered material for the member now also includes the copies with the status *B – retained*.
- The length of the slip for self-checkout of reserved material was shortened.
- Bug fixes:
  - when displaying the call number on the lending note for newly received reservations;
  - when processing a reservation of available material that is on interdepartmental loan from the mobile library department;
  - when returning serials with bound issues.

#### V6.28-00(05), 8 April 2021

- When preparing material for collection in another department other than the one where the material was reserved, the time period (value *wait.* in the time parameter table) that is applicable in the pickup department is taken into account.

#### V6.28-00(04), 27 March 2021

- Bug fixes:
  - when deleting the reservation of a serial by entering the identification number;
  - when deleting a temporary note for unavailable material;
  - when adding material to a reading set, if the material is on interdepartmental loan;

- when returning material in a set with restriction, if there is a reservation of another set with the same COBISS-ID for this material;
- when cancelling the reservation of a set in My library;
- when displaying the subject when sending a special e-notification.

#### V6.28-00(03), 16 March 2021

- Bug fixes:
  - for the speed of opening the price list in the procedure for entering debts and editing the price list;
  - when preparing material for collection at the mobile library, if the library enables their members the collection of material at different pickup locations;
  - when printing a lending note using the key combination <Alt + D>;
  - when returning material in a set, for which there is a reservation of another set with the same COBISS-ID.

#### V6.28-00(02), 9 March 2021

- Bug fix:
  - when calculating the due date, if it falls on a day that is marked in the calendar as a non-working day with overdue fee calculation (date in blue textbox).

#### V6.28-00(01), 6 March 2021

- Bug fixes:
  - when opening the **Home library material** window in a department where the loan period for the member is overdue, and the library has the option for a fixed late fine calculation activated, or the tolerance in the time parameters for the first overdue notice is entered in working days or there is no tolerance;
  - when lending material, if one of the copies of this material is on interdepartmental loan and there are reservations for his material in the host department;
  - when opening the search window, in which a search results display is selected with a non-existing attribute;
  - for the activities in the window for entering the copy's ID number in the **Home library material** window after manually changing the due date.


#### V6.28-00, 27–28 February 2021

- The process for opening the **Home library material** window for the member loaded to the workspace is changed. From now on, the window can be opened in one of the following ways:
  - by double clicking the selected member,
  - with the key combination <Ctrl + E>,



- by right clicking the selected member and selecting the method **Home library material**.

The same changes also apply to the process for opening the **Home library material** window for the library department.

From now on, the method **Home library material** is the first on the list of methods which can be selected after right clicking the **Member** and the **Department** objects. With this change the process of opening the **Member** editor is also changed. From now on, the **Member** editor can be opened only from the **Home library material** window by clicking the  (**Edit**) icon. This change also applies to the process for opening the **Department** editor.

- The option for signing a lending form with a signature pad is added. If you want to use the signature pad for signing the lending form, click the **<Alt>** key and the **Lending form** button simultaneously in the **Home library material** window. The **Overview and sending of created report** window will open, where you open the menu by right clicking the name of the *Lending form* report and then select the **Sign document** method. By doing this, you activate the signature pad and give it to the member for them to sign it. After the member confirms the signature by clicking the green checkmark, a PDF document will open on the screen. The signed document can be reviewed and printed on the printer used for printing lending forms. If you print out the lending form from the **Overview and sending of created report** window by clicking the **Send** button, the lending form will not have a signature. If there are any specific settings in the library for sending the lending form to the member's e-mail address, the signed lending form is automatically sent to the member's e-mail address after you close the PDF document. The signed lending form is saved in the archive of the member's e-documents, which can be accessed with the object method **Member / Archive of e-documents**.

**NOTE:** If the value *3 – printer and e-mail* is selected in the settings for lending forms (method **Home library / Create lending forms and invoices**) in the "Destination" column, only the document which is to be printed can be signed, which means that the lending form will not be sent to the member's e-mail address.

If you use the key combination **<Alt> + <D>** for printing the lending forms, document preview will open from now on.

- In the settings for e-notifications at the library level, the option for sending the lending form via e-mail is added (method **Home library / Electronic notifications**). Tick the *Lending form* checkbox in the **E-notifications** window, which will enable members to receive lending forms to their e-mail. The new type of e-notification *Lending form* is also added to the data for e-notifications for the member. Only sending the lending form to the member's e-mail address is available, other methods are not enabled. Lending form for a member subscribed to receiving the lending forms via e-mail can be printed by holding the **<Ctrl>** key and clicking the **Lending form** button.

**NOTE:** In My Libraries, the option for the member to subscribe to receiving the lending form via e-mail will be available with the installation of the new version of COBISS+, presumably in March.



If you were already using the option for sending the lending form to the member's e-mail address in the library (method **Home library / Create lending forms and invoices – 2 – e-mail** or **3 – printer and e-mail** is selected in the "Destination" column), we recommend that you use the option in the e-notifications instead.

- The option for displaying only available material copies during a search is added to the catalogue. If you add a tick in the **Available** checkbox when specifying search criteria, only available copies will be displayed as the search result, which means that they do not have the status on loan because they are not entered for any members. You can also select the checkbox after you perform the search. Limiting the display of search results to only available copies does not influence the display of the number of found fields 996/997 or the number of found bibliographic records.
- Two shortcuts for a quicker return of material with restriction are added. The first is using the <B> key on the keyboard for entering the return of material with restriction. The second option is adding the shortcut to the toolbar. You can add the shortcut by right clicking the browser toolbar (**Setting the toolbar**) and then adding the tick and selecting the designation in **Unavailable material / Return with restriction**.
- The procedure for creating the registration form with the **Registration form** button in the **Member** editor has been optimized. The steps, where the librarian had to confirm the beginning of the data display on the signature pad and the display of the signature window, have been removed. The librarian also does not have to conclude these steps any more.
- When signing the registration form with the signature pad, the signed document is sent to the member's e-mail address if it is entered in the data for e-notifications.
- The option for replacing the member with a reservation of available material with the member who is the first in line in the reservation queue for this material. This option can be used if the member cannot collect the reserved material in the required deadline and wishes to give the material to the member who is the next in line in the reservation queue. The replacement can be made by highlighting the reserved copy in the **Home library material** window (status *O* or *W*) and pressing the <Ctrl> key + **Return** button. After confirming the replacement in the reservation queue, the copy will be allocated to the first member in the reservation queue and the copy status will remain the same as it was for the previous member (*O* or *W*). The member, for whom the material was already prepared, is moved to the 1<sup>st</sup> place in the reservation queue. No special privileges are required for using this option. If the copy had the status *W*, a notification about received reservation is sent to the member and a slip with reservation details is printed. If the copy had the status *O*, the notification on the received reservation and the printing of the slip is performed during the reservation processing. When replacing the member with the reservation, the transaction *39 – manually editing the reservations list* is entered.
- Until now, restrictions for online registration (method **Home library / Restrictions for online registration**) could only be set for the entire library and they were valid for all member categories with the online registration enabled. From now on,

restrictions can also be set for individual category or group of member categories (for multiple categories). You can do this by clicking the **Add** button in the **Restrictions for online registration** window. A list of members that have the online registration option in the library enabled will open. Select one or multiple members categories (by using the <Ctrl> key), for which you want to designate specific restrictions. After you confirm, the **Restrictions for online registrations** window expands with a new column for the selected category or group of member categories, where you designate limitations valid for this category or group of member categories (e.g. *Category: 003, 004* if you enable online registration for students and you want to designate specific restrictions for them). If you decide to remove the restrictions set for individual category or group of categories, you can do this by clicking the **Remove** button. A window will open, where you select the category or the group of member categories for which you want to remove the specific restrictions. After you confirm, these restrictions are deleted and from now on, the restrictions valid for the entire library (i.e. *Home library*) are also valid for the members from these groups.

In the **Restrictions for online registration** window with – **membership** added to the window title, the functionalities of the following columns are changed: *Unsettled membership fee* into *Unsettled* and *Settled membership fee* into *Settled/none*.

- A new class method **Member / Batch deletion of notes for inactive members** is prepared, which enables batch deletion of notes for the members who are no longer active and who would be deleted from the members database during the batch deletion of **all inactive members** if the note would not be entered. When using this method, the software offers the deletion of notes for all inactive members (option **Select all**), or you can select the members for which you want to delete the notes and in this case you can continue the process by clicking the **Select** button.
- From now on, in a library with loan organised by departments, you can use one place to specify the days when the library is closed in all departments and the same rule about calculating fines applies in those departments. You can do that by selecting these days in the **Home library** calendar, then tick the checkbox next to the option **Copy setting to calendars of all departments** and copy the setting to the calendars of all departments by clicking the **Select** or the **Select all** button and saving the changes in the calendar (**OK** button). The function of the **Remove** option remains unchanged and the calendars of departments are still edited separately.  
**TIP:** We suggest that if you want to enter changes that apply for the home library and the calendars of all departments into the calendar of the **Home library**, you do this separately and save the changes and then you separately edit the settings that apply for the departments without their own calendar.
- A new display **cancellations of reservations with status W** is added to the displays in the **List of reservations and cancellations of available material** window. You can use this display if you are only interested in reservations cancellations of material with the status *W – waiting on the shelf (reserved)* and no others.

- Option to copy the value from individual cells by using keyboard combinations <Ctrl> + <C> and <Ctrl> + <V> is also added to the **List of reservations and cancellations of available material** window.
- In libraries where members can collect material at different pickup locations, a condition for collecting material is supplemented (reservations restriction according to the loan status). The option for entering new conditions for collecting material is also added (reservation restriction if the material is transferred to the mobile library and restrictions depending on the contents of the subfields 675b – *UDC group* and 996/7o – *Date of accessioning*).
- If the e-notifications settings of the member about available reserved material are not activated (e.g. the member is not subscribed to this option), from now on, the software notifies you when the reserved material is available and when it is prepared to be collected.
- If you loan another copy of the same material title to the member (i.e. from the same bibliographic record) as they have reserved (status *O*) or if the material is ready to be collected by the member (status *W*), the software notifies you during the loan process.
- As of now, when entering the postal address of the member the *guarantor's/guardian's add. and perm. address* can be set as the default value of the postal address type. The default value can only be set for individual member categories. It is included at the request from the library with a special parameter.
- From now on, multiple member groups can be assigned to the member. This option is taken into account when printing member data, member search, data export, in the methods **Member / Update member details – export** and **Member / Update member details – import** as well as in preparing statistical reports of members, where the data is also sorted by member groups (e.g. *Loan-BibSiSt-01*, *Loan-BibSiSt-11* and *Loan-BibSiSt-21*).
- From now on, the correct date of birth is also checked when registering members. The date cannot be later than the current date or older than *1 January 1901*.
- When the member becomes of age and still has the guarantor's/guardian's e-mail entered in the notification data, a software message will appear. As long as the guarantor's/guardian's e-mail is entered, this address is visible in the data editor for e-notifications, regardless of member's age.
- From now on, the following actions are performed when **preparing a reference students database**:
  - all controls regarding the correctness of the data structure and regarding the mandatory data for all data in the input file;
  - if there are any errors, a window will open which includes the line and a description of the error;
  - if the student record is duplicated, information on duplicate record is displayed;
  - from now on, the user number is considered as mandatory data.

To continue the work, the input file with the student data must be corrected in its entirety. Once the contents and the structure of the input file are correct, the process of entering student data in the reference database will be performed.

- The algorithm for specifying the member category when entering a member from the reference database and when updating data based on the data in the members reference database is changed:
  - if the value *02 – part-time* or *03 – part-time study – remote study* or *04 – part-time study – e-study* is entered for the student as the type of study and the value *(II. or (III. or (POSTGRADUATE* is not specified under the study programme, the category *005 – students (part-time)* is specified for the member;
  - category *020 – postgraduate students* is specified for all students of the programmes level *(II. or (III. or (POSTGRADUATE* at registration regardless of the type of study;
  - category *004 – students (full-time)* is specified for all other students.
- From now on, all users with the privilege *LOAN\_BASIC – New members and change of member data, and loan related procedures* can update individual member records with the object method **Member / Update member details – student**. Until now, only users with the privilege *LOAN\_STUD – Maintenance of reference students database* were allowed to perform this procedure.
- The option for copying the list of material loaned in other departments is added. You can open the list by clicking the notes indicator *CIR* in the **Home library material** window. You can select one or more rows and copy them by using the key combination <Ctrl> + <C>. You can then paste the copied rows with the keyboard combination <Ctrl> + <V> (e.g. into an Excel file).
- Based on the valid licences for loaning online resources (e-books from the provider Biblos, audiobooks from the provider Audibook), the report in the catalogue is supplemented with the data on the provider, number of copies, and the type of electronic resource.
- The option for preparing a list of non-cash payments outside of the library is added when closing the cash register balance (method **Cash register balance / Close cash register**). When you click **Check invoices** in the **Closing out cash register - open cash registers** window, a list of invoices for the selected cash register balance is displayed and you can decide if you also want to check and print the list of non-cash payments outside of the library. After you confirm, a window for specifying a period, username and library department will open.
- If you manually change the validity date of the status *B – retained* for a copy with an already expired status, the fine will not be entered.
- In software messages, the name COBISS/OPAC is replaced with COBISS+.
- In the following loan transaction statistical reports, a new parameter of the "Provider/portal" query is added:
  - *LOAN-STA-T10: By intended purpose*
  - *LOAN-STA-T11: By intended purpose/language/675s*
  - *LOAN-STA-T13: By 675s/intended purpose*
  - *LOAN-STA-T14: By municipality*
  - *LOAN-STA-T15: By municipality/member category*
- In the statistical reports BibSiSt, the term *e-books loan* is replaced with the term *loan of web resources*.

- In the reports *LOAN-CRO-02: List of invoices incl. VAT* and *LOAN-CRO-03: Summary of list of invoices incl. VAT* the data is from now on sorted by the time of entering the debts settlement from oldest to newest by default. According to this classification, from now on when displaying the range of invoice numbers, first the data on the invoice number with the time of issue for the invoice entered as first on the report is displayed, followed by the invoice with the time of invoice issue entered in the report as last.
- Bug fixes:
  - when loaning material from the reading set, if the member has a reservation from the same COBISS.XX-ID;
  - in allocating material to the first member on the reservation list if the material is removed from the reading set;
  - in the **Insight into the library material status** window if material from a reading set was loaned;
  - from now on, when reserving a copy in COBISS+ if a member selects a copy on interdepartmental loan, a check is performed to see if the member already reserved material with this title;
  - the window with the display of the progress bar for the procedure is added in all steps of batch deletion of all groups of members or a selected group of members when specifying a typical week, specifying material turnover, and when analysing material loan;
  - in batch and individual updates of students data, the username of the person who performed the update is entered in the "Modified by" attribute;
  - when preparing a list of members with data for e-notifications for libraries with a large number of members (method **Electronic notification / List of members with data for e-notification**);
  - when sending e-notifications to members who have guarantor's/guardian's e-mail entered in the data for e-notifications;
  - when displaying the start and end date for calculating fines;
  - when displaying the number of late days in the **Home library material** window if the library does not charge daily fines;
  - when entering the transaction *18 – return with restriction* (note on transaction);
  - in saving the pickup location when reserving a serial issue (in libraries that have the option to enable members to collect material in different pickup locations);
  - bug fix in the display of the number for SMS notifications in My Libraries service
  - in searching audiobooks in the catalogue.

#### V6.27-03(05), 13–14 February 2021

- Bug fix in the method **Notification / Send special notification to e-notification recipients**.

#### V6.27-03(04), 6–7 February 2021

- In libraries where members can collect material at different pickup locations, the primary pickup location is now automatically entered to the reservation sent via

COBISS+ or mCOBISS if the pickup location information was not sent to the COBISS3 environment when reserving material via COBISS+ or mCOBISS for any reason.

- In the statistical report *LOAN-BibSiSt-32: Loan of material, the classification fiction\_non-fiction\_BibSiSt\_1 (fiction, non-fiction according to NUK instructions)* was replaced by the classification *UDC 675s\_BibSiSt\_1 (82, other)*.
- In the classification *transaction type\_BibSiSt\_4 (loan, return at self-checkout)*, the transaction *18 – return with restriction* is added to the return at self-checkout.
- Bug fix:
  - when following of the reservation queue when allocating a copy.

#### V6.27-03(02), 23–24 January 2021

- Bug fix:
  - when returning material in the **Home library material** window if the material was not loaned for this member.

#### V6.27-03(01), 15–16 January 2021

- Bug fix:
  - when preparing a list of members with data for e-notification;
  - when returning retained material (status *B*) in another department.

#### V6.27-02, 19 December 2020

- From now on, when deleting individual or multiple selected reservations in the **Deleting reservation** window, where you can confirm or cancel the reservation deletion, you will also see the reservation data (reservation status, reservation date, reservation expiry date) and data on the member for whom the reservation will be deleted (membership card number, name and surname, as well as the last note entered for the member) along with the title, accession number and the type of material.
- On the *Slip with reservation details – self-service collection*, the member identification and the reservation expiry date are shown in a bigger font.
- Data on e-books loan added to recording loan transactions: provider/portal, licence type and type of electronic resource (from 135a). New data will be recorded into the transaction files after the installation of the version V6.27-02, previous data will not be added. The data can be used in the data export tool.
- Bug fixes:
  - in automatic creation of spots for processing reservations when activating the COBISS3/Loan software module;
  - in allocating reserved material if the outside loan of the returned copy is restricted;
  - in material on interdepartmental loan when the reserved material is allocated in the host department.

#### V6.27-01(01), 30 November 2020



- Bug fixes:
  - in interdepartmental loan;
  - in checking whether the municipality of the permanent address matches the municipality of the permanent residence.

#### V6.27-01, 25 November 2020

- Option added for sending a special notification to the members that are subscribed to e-notifications about a forthcoming overdue notice and/or loan period expiry date and that have material with already expired loan period (or the loan period will soon expire) or that have material for which they already received an overdue notice. This enables you to notify members who received e-notifications during these exceptional circumstances about a forthcoming loan expiry date or an overdue notice, so that when measures are withdrawn at a certain date, you can once again start charging fines and issuing overdue notices. Use the method **Notification / Send special notification to e-notification recipients** to send the special notification. In the **Special notification** window, first specify conditions for loaned material by entering the period for the loan expiry and specify whether an overdue notice has already been entered for the material. Then select the members you want to send the special notification to according to the type of e-notifications they are already subscribed to. Enter the text of the special notification in the windows for all three methods of e-notification: e-mail, SMS or push notifications. The SMS-notification is limited to 155 characters. The default title of the special notification via e-mail can be changed by copying the variable in the *COBISS3/Reports* segment to the user variables. For this purpose, a new variable **Special notification title** has been defined in the **Standard / Loan / Variables / E-notifications** folder.
- An option for self-service collection of reserved material has been added, which enables the member to find the material they reserved on the specified shelf. For this purpose, a new version of the report *Slip with reservation details* is available and it will be displayed when preparing the reserved material for collection. The slip is approx. 24 cm long and it starts with the first two letters of the surname and the first letter of the name, followed by a hyphen and the membership card number, e.g. ABC-0100575. All other member data is removed from the slip. The update is activated upon library's request for the entire library or for individual departments with a special parameter.
- The slips for reservation processing now also include the e-mail of the guardian/guarantor if it is entered for the member in the e-notifications data.
- Bug fixes:
  - in preparing the report *LOAN-MM-01: Members with entered material*, when selecting members with the **Select all** button;



- in e-notification, when the members have their own e-mail and the e-mail of the guardian/guarantor entered.

#### V6.27-00(09), 21 November 2020

- The selection of e-notification type is enabled for under aged members even if only the e-mail of the guardian/guarantor is entered.
- When changing the member e-mail, a message is displayed if a COBISS profile with this e-mail already exists.
- The data under "Destination-address" is updated for e-notifications with the display of e-mail of the guardian/guarantor if the e-notification was also sent to this e-mail.
- Bug fixes:
  - in entering a transaction for a return with reservation in another department;
  - in accessing the documents archive – the document type where the document number can be duplicated is also taken into account (invoices, registration forms);
  - when deleting an SMS-number in My Library via COBISS+;
  - in the display of the code list and in the expand option;
  - when using the *NOT* operator when creating the report *LOAN-MM-01: Members with entered material*.

#### V6.27-00(08), 14 November 2020

- Bug fixes:
  - in searching the **Member** search window by e-mail;
  - in creating the reports *LOAN-MM-01: Members with entered material* and *LOAN-MM-03: Members and loan period date about to expire*;
  - when deleting an SMS-number for e-notifications in the My Library service;
  - in the expand option and in the display of the code list *Loan status* in the **Unavailable material** search window.

#### V6.27-00(07), 11 November 2020

- The reservation of material that is still entered with the status *b – retained* for the member is enabled, because we entered return with restriction for the material.
- Bug fixes:
  - in the message displayed for the member in COBISS+ after a successful unavailable material reservation;
  - in sending a welcome message when a new member is registered – the message is also sent to the e-mail of the guardian/guarantor if it is entered for the member;
  - in checking the existence of an e-mail when sending a message with a link for setting a password for My Library – e-mail of a guardian/guarantor is also taken into account;

- in the display form of the prices for the method **Entered debts / Overview of debts**.

#### V6.27-00(06), 4 November 2020

- Bug fixes:
  - in printing the slip about received reserved material;
  - in the online member registration with a student identity;
  - in the loan of material in a library with departments, when the data on the copy sublocation is not entered;
  - in calculating the reservation validity expiration date of an available copy;
  - in returning material with restriction in another department if the material is reserved in the parent department;
  - when disabling services because the loan period of the material is expired and the material has the status *b – retained*;
  - in an interdepartmental return if the copy in a host department is entered for the member and it has the status *b – retained*;
  - in adding a new copy in libraries without departments and in checking reservations;
  - in adding a new copy of the material for which there are reservations if the user is logged into another department.

#### V6.27-00(05), 27 October 2020

- Bug fixes:
  - in printing a lending form with the key combination <Alt> + <D>;
  - in displaying the status of a reserved copy in COBISS+ when the same copy is being returned in COBISS3/Loan;
  - in the batch update of member data with the method **Member / Update members details - students**;
  - in loaning multi-volume material with an RFID-panel;
  - in entering debt for an uncollected reservation when batch deleting expired reservations.

#### V6.27-00(04), 21 October 2020

- Bug fixes:
  - in processing a reservation of missing material;
  - in printing slips and lists for reservation processing;
  - in reserving material according to the entered call number elements.

#### V6.27-00(03), 20 October 2020

- Bug fixes:
  - in preparing XML-overdue notices;
  - in methods for updating member data.

#### V6.27-00(02), 19 October 2020

- Bug fixes:

- in preparing a reference database of members in case of incorrect data structure;
- in the sending of a message when the procedure for defining a scheduled material turnover is completed;
- in reservation of material with libraries with departments if only elements d\i and d\u are specified in the call number.

#### V6.27-00, 17–18 October 2020

- The **Entered debts / Overview of debts** method was added, which displays the sum of all outstanding debts by departments and by the attribute "Service/debt". At the end of a list is the sum of all outstanding debts for the entire library. For further processing, the data can be exported to other tools (e.g. Excel).
- The **Member / Update member details – export** method and the **Member / Update member details – import** method were added. With these methods, you can update the following member details:
  - Class/grade;
  - Course of study;
  - Members group;
  - Restricted number of copies on loan (l);
  - Renewal limit (l);
  - No. of reservations restr. (l);
  - In recovery;
  - Statement signed;
  - No membership fee (privilege);
  - No loan fee (privilege);
  - No overdue notices (privilege);
  - No fine (privilege);
  - No reservation fee (privilege).

Firstly, use the **Member / Update member details – export** method and select, which member details you wish to export. The search window of the **Member** class will open where you can specify the members you wish to export for a detail update. Next, select the file name and location where you wish the file to be saved. Once the export procedure is completed, the software will display a message. Finally, edit the data in the exported file, e.g. using Excel. **NOTE:** Do not change the cell structure. For data coming from a code list, enter the codes from the code list, e.g. class/grade. For data, for which you tick or untick boxes in the **Member** editor, enter the values *0 (NO)* and *1 (YES)* (e.g. privileges, statement signed, in recovery), and for the restrictions on the number of copies on loan, renewals and reservations, enter numeric values.

Next, update the member details by using the **Member / Update member details – import** method. Firstly, select the file, based on which the member details will be updated. Next, select the details you wish to update for the members. A statistical report on updating details and the number of members, for which the data will or will not be updated, as well as which members do not exist in the database, will be displayed. **NOTE:** Check the individual member lists to make sure that the correct

data will be updated. Click the **OK** button and the software will ask if you wish to update the details. If you continue, the procedure of updating the selected member details will start and, at the end of the procedure, the statistical report on the updated member details with the option of displaying individual lists will be displayed again. **NOTE:** The procedure should be performed outside working hours. To use this new method, the new privilege *LOAN\_MODIFY – batch update of member details* is required.

- From now on, entering and changing the My library password is only possible in My library. The librarian at the lending desk can no longer update the password. Once you click the **Password** button in the **Member** editor, the option of sending a notification with a link for changing the password to the e-mail address in the member's e-notification data will be displayed. If the member is younger than 18, the notification can also be sent to the guardian/guarantor e-mail address from the e-notification data.
- In libraries, in which the control for checking the compliance of the address with the Register of the Surveying and Mapping Authority of the Republic of Slovenia (GURS) is activated, the attribute "Permanent address municipality" was added in the **Member** editor in the **General** tab. The attribute value is added automatically when checking the compliance when entering the permanent address. If the permanent address municipality is different from the permanent residence municipality, a warning appears when you save the data.
- If the library member is of age and only one address is entered for the member and the address type is *guarantor's/guardian's address and permanent address*, a warning is displayed that the member is of age even in those cases, when the use for sending overdue notices is not specified for this address. The warning is displayed when using the following methods: **Member / Edit, Member / Home library material and Unavailable material / Return, delete**. Once you click the **OK** button, you can continue working and, if required, edit the address details in the member details.
- For members that are under 18 it is possible to enter the guardian/guarantor e-mail in the **E-notification** window. If this e-mail address is entered, all notifications that the member is subscribed to will also be sent to this e-mail address. The notification for resetting the password when editing member details in the library will also be sent to this e-mail address.
- Checking for duplicates in the members' database has been updated so that a duplicate is also recognised in case a double-barrelled surname or name is entered in the reverse order as for the member that was already entered. The check does not work if punctuation marks were used between names and surnames.
- Upon the library's request, it is now possible to disable the entry of the attributes "Gender" and "Citizenship" as well as attributes related to the **Schooling, employment** tab in the **Member** editor with a special parameter.
- When entering an alternative membership number, the last selection of the alternative number type is saved to the user settings. This means that next time you enter an alternative number, you do not have to select the alternative number type again as it is the same for most members.

- A solution was prepared for entering an alternative membership card number for cards with a RFID chip.
- When preparing the students reference database, the e-mail address is no longer mandatory data. If the student does not have one, you can leave it blank.  
**NOTE:** The e-notification e-mail address is a unique member identification detail, based on which the My COBISS Profile is created; a fictitious e-mail address must not be entered during automatic registration of members from the students reference database.
- If you decide that you will lend reserved material (the copy has the status *o – reserved available copy*) to another member, then the reservation of another available copy will be automatically recorded, if the copy is available for loan without restrictions in the reservation department. If there is no other available copy, the reservation of unavailable material (status *R – reserved unavailable material*) will be recorded as before.
- When returning a set, and there is a reservation for a set with the same COBISS.XX-ID, a warning about the reservation is displayed. You can decide if you wish to assign the member the set you are returning.
- A control was added to check reservations when adding a new copy of material that is available for loan without restrictions. When you delete the value under "Status (q)" in the **Field 996/997** editor, in case there are reservations for the material with this COBISS.XX-ID, a warning is displayed along with the question, if you wish to assign the copy to the member who is at the top of the list of reservations. If your answer is yes, the copy is recorded for the member with the status *o – reserved available copy*.
- The **Cover** button was added in the **Home library material** window and the **Catalogue** window. Once you click on it, the cover for the currently selected material will be displayed. Instead of clicking the **Cover** button, you can also use the key combination <Alt> + <S>. The cover will not be displayed if it does not exist in COBISS+. The update can be activated with a special parameter upon the library's request.
- When displaying the member details in the **Home library material** window, you can also include the display of the university in eVŠ with a special parameter upon the library's request.
- In libraries that activated the option that enables their members to pick up material at different pickup locations, the name of the 4th column was updated, in which the data on the pickup location is displayed in the second row in the **Home library material** window.
- Automatic sorting of e-notifications by time of creation was added in the **Notifications** folder. After you click the **Member – Notifications** link, the notifications in the table are sorted by time of creation; at the top of the list is the e-notification that was sent last.
- When you return material with restriction, the details on the last received overdue notice will not be deleted in the **Home library material** window.
- The option of preparing a scheduled report outside working hours was added for the **Unavailable material / Define material turnover** method.

- If only the relocation date is entered in field 996/997 but not the relocation sublocation, the copy is displayed in the catalogue in COBISS+ in the department it belongs to, based on the sublocation in call number.
- The **Last search** button was added in the catalogue for repeating the search request from the previous search in the catalogue.
- The ISBN search field was added in the **Unavailable material** search window. Searching by ISBN is possible for unavailable material that was recorded as unavailable after the installation of this software version (V6.27-00).
- The display of the title in full was added to the display of search results in the **Unavailable material** search window. The attribute for searching by title of unavailable material was renamed from "Title" to "Title (short) ", because only the first 25 characters from the title are saved there.
- Because the discount rate that is defined for the price list item after including the software update with the option of calculation the discount when charging for library services or calculating debts (V6.25-00, installed 1 February 2020) is no longer taken into account, the display of the discount rate was removed when editing an individual price list item, when entering debts and entering discount in the window for selecting the service/debt.
- In the **Entering/settling debts** window in libraries with departments, the list of debts will be displayed for the department you are logged in. If you wish to see the member's debts in all library departments, select *all departments* from the drop-down list. The last selection is saved to the user settings, which means that next time you open the **Entering/settling debts** window, the same department or *all departments* will be selected again.
- When you write off debts during automatic entry, a warning will be displayed which requests a confirmation of the debts write-off. This means that you have the option of cancelling the debts write-off in case you made a mistake.
- The privilege required for batch deletion of debts by using the **Entered debts / Batch deletion of debts** method was changed; instead of the privilege *CRO\_DEL – Deleting debts*, the privilege *CRO\_PL – Price list management* is now required.
- In libraries that use the cash register with invoice tax confirmation, when cancelling the settlement of debts, the report is sent to the printer without a preview.
- The option of closing windows by pressing the <Esc> key on your keyboard was added for windows that open when you use the methods in the **Entering/settling debts** window (e.g. **View settled debts**), when closing the cash register, and when sorting the protection status for RFID devices.
- It is possible to add a shortcut to the toolbar for recording the fluctuation of material from and to the mobile library. To add the shortcut, right-click the browser toolbar (**Setting the toolbar**) and tick the box for **Department / Transfer material to or from mobile library**.
- An automatic warning was added which is displayed while processing reservations when arranging material for pickup, if you assign another copy to the member than the one that was reserved, and that copy has the status *9 – de-accessioned* or *2 – in process*.

- The option of creating a welcome message was added. The message is automatically sent when a registering new member to the e-mail address that was entered into the e-notification details. You can add the library logo and any text to the welcome message. Use the **Home library / Contact details and information for COBISS+** method and in the Welcome message tab, enter the link to the page with your logo into "Logo" and any text you wish to be displayed in the message into "Additional text". The logo is also displayed in the notification for confirming online registration, the notification you receive when entering or changing the e-mail address for e-notifications in the library, the notification for setting your library password and the notification that is sent to the member in an material order or ILL request.

**NOTE:** The entry or change of these settings takes effect when the settings are refreshed, i.e. once an hour.

- For online membership registration, the membership fee debt is recorded based on the selected member category also in cases when the member is under 18. An updated can be activated with a special parameter upon the library's request.
- If the library charges the members for reserved material that was not collected, then this debt is also recorded in cases when a member cancelled an expired reservation for material that is waiting at the library (status *waiting on the shelf (reservation)*) via COBISS+ or mCOBISS.
- Upon the library's request, a special parameter can be used to disable reservations in My library for members with an expired library membership, despite the fact that the membership fee is not calculated according to the valid price list automatically, but manually.
- In My library when viewing the history of borrowed material (Loan history) the material is also displayed that was borrowed by the member before changing the library membership number. The insight is limited to material that was borrowed with the use of COBISS3/Loan software.
- The option was added for preparing overdue notices for sending by e-mail. In the **Create overdue notice** window, select which overdue notices you wish to send to an e-mail address (e.g. tick the box for *1st overdue notice to the e-mail* and for *2nd overdue notice to the e-mail*). The overdue notices for sending by e-mail are prepared for those members which have their e-mail addresses entered into the e-notification data. For other members, the overdue notices are prepared in the form for printing on the printer.  
**NOTE:** If you prepare overdue notices in XML-form, do not use the option for sending them by e-mail.
- When displaying overdue notices in XML-form, it is possible to add the data on the loan expiry date with a special parameter upon the library's request. The data is displayed for each copy separately in the element `<bookRetDate>dd.mm.llll</bookRetDate>`.
- When sending a lending form in electronic form, the text *Document attached.* was added to the e-mail.
- When preparing the report LOAN-Mt-02: List of most requested material, the search parameters "Title" and "Author" have been removed.



- For the purposes of providing information on loan material to the public, the new report *LOAN-Mt-10: Transactions with material (for public relations)* was added. The report was added to the subfolder **Lists / Material**. When preparing the list, the **Search – Bibliographic record** search window will open, where you can find and select the material you wish to include in the list. Next, specify, which transactions you wish to take into account when preparing the list, the period of recording these transactions and the transaction department.
- When the report preparation is finished, two forms (reports) are created:
  - *Transactions with material – first 100 titles*; the first form is designed for printing on the printer. In the second form, the data is prepared in a text file and separated with the "|" sign. The form can be saved to the appropriate location by clicking the **Save as** button. For further processing, you can import the data to other tools (e.g. Excel).
- **NOTE:** If you prepare the report for a longer time period or for a larger amount of material, it must be scheduled outside working hours.
- In the **Transactions** search window, the attributes "Note on transaction" and "UDC for statistics (675s)" are indexed by word, and the other attributes by phrase.
- The option was added to save the report *LOAN-EXP-06: List of members' debts* directly to Excel (.xls). After preparing the report, click on the **Save as** button in the **Overview and sending of created report** window to specify where you want the file to be saved, and under "File type", select the option *Excel Files[UTF-8] (.xls)*.
- Bug fixes:
  - when returning material when using the **Unavailable material / Return, delete** method and the **Unavailable material / Return with restriction** method, instead of the message that the material has the status *available* in loan, the message now appears that the copy has the status *7 – misplaced* in holdings or that the material is reserved for a reading set;
  - when returning material from the textbook fund in any department;
  - when checking the simultaneous loan of material with the same COBISS.XX-ID from the catalogue or with RFID;
  - when sorting data in the report *LOAN-Mt-07: List of material without transactions/ with transactions (by title), in the second form (report) List of material with transactions (by title) – first 100*;
  - when displaying the status of a reserved copy in COBISS+ while this copy is being returned in COBISS3/Loan;
  - when reserving a copy without a call number in libraries with departments – the reservation is disabled;
  - when appointing a copy without a call number to a member with a reservation in libraries with departments – the appointment is disabled;
  - when transferring a permanent address abroad when registering a student from the students' reference database;
  - when displaying the information about the last received overdue notice for material that was returned with restriction (loan status *b – retained*);

- when displaying the postal address of the member when preparing the reports *LOAN-MM-04: Notification about a loan period expiry date (mail)* and *LOAN-MM-05: Notification about a loan period expiry date (e-mail)*;
- when entering the attributes "Entered by" and "Entered" when changing the calendar;
- when deleting the link to the superior member for members in the category *019 – family card*;
- when recording the attributes "Modified by" and "Modified" when using the **Member / Change class/grade** method;
- for the colour of buttons in the **Home library material** window, if the *Entry denied* restriction is set for the member;
- for the message that appears when you process a reservation if you appoint the member a copy other than the one that was reserved, and that copy belongs to the department that is different to the department of reservation.

**V6.26-01 (07), 26 September 2020**

- Bug fix:
  - when entering the computer name for electronic devices outside the business premises.

**V6.26-01 (03), 15 August 2020**

- Bug fix:
  - when calculating the late fee, if the new price list becomes valid on the day of loan period expiry and there is no grace period defined in the time parameter table (*fine* column).

**V6.26-01 (02), 30 July 2020**

- Bug fix:
  - when granting privileges for working with Urbana.

**V6.26-01 (01), 7 July 2020**

- Bug fix:
  - in the common members' database.

**V6.26-01, 24 June 2020**

- In statistics for loan for school libraries that match the data from the BibSiSt questionnaire (*LOAN-BibSiSt-01: Library members*, *LOAN-BibSiSt-02: Loan of material*) from now on the transactions for copies from sublocations that define material from the textbook fund are no longer taken into account.
- Bug fix:
  - when lending material, if the days when the library is closed and for which an overdue fee is charged are marked in the calendar.

**V6.26-00(08), 24 June 2020**

- Bug fixes:

- for loans at the self-checkout;
- when returning a set at another department.

#### V6.26-00(07), 20 June 2020

- The **Field 996/997 / Adding/removing material for reading sets** method has been improved with a control to check if the set is complete. This means that you can now only add or remove a complete set to/from the reading set. In the **Entering material transfer to or from reading sets** window, the option of printing bar codes on the lending note printer was added. If you wish to use this option, tick the box next to the **Add AN/LN to the list for the display of bar codes** option. Start adding material to the reading set and the added accession numbers or loan numbers for each reading set will be displayed in the **AN/LN list for display of bar codes** field. Once all the material for each reading set is added, select the **Print** button, and use the printer, defined for the logical destination *Lending form – Loan*, to print the bar codes from the list. You can then use them for easier loan of reading sets.
- Bug fixes:
  - for the form of notification about online payment that the user receives by e-mail;
  - for the text in the window for quick returns with restriction (**Unavailable material / Return with restriction method**), if a RFID device is used;
  - when returning material with restriction in the **Home library material** window, if the material is on loan with another member;
  - when batch deleting expired reservations;
  - when entering debts manually.

#### V6.26-00(04), 23 May 2020

- For easier returns of material that must be placed under quarantine and has the status *b – retained* set in loan, the **Unavailable material / Return with restriction** quick method was added. The instructions available at this still apply.

#### V6.26-00(03), 20 May 2020

- When placing material under quarantine, the calendar is not taken into account, if the validity period is set with the appropriate parameter for status *b – retained*.

#### V6.26-00(01), 30 April 2020

- The option was added for defining the period, during which the status *b – retained* is valid in loan. This is connected to quarantining returned material in accordance with the recommendations of the Slovenian National Health Institute (NIJZ). The functionality was activated with the corresponding parameter. If the parameter is not defined, the value *res.* in time parameters is taken into account. The instructions on recording the return of material that must be quarantined can be found at the [link](#).
- Bug fix:

- For the control of required privileges for using the **Material / Transfer reservations to other material** method. The privileges *HLD\_CTD – Transfers, field deletion* and *LOAN\_RES – Editing list of reservations* are required.

#### V6.26-00, 25–26 April 2020

- The option for overviewing loan transactions for individual members is added with the object method **Member / Show transactions**. Search for the member whose transactions you want to see and use the **Show transactions** method (right click) on the object loaded onto the workspace. In the **Search – Transactions** window you can limit the display by various criteria, e.g. by a specific transaction type in a specific time period. The new method only allows the overview of transactions, but transactions reports are still available in *COBISS3/Reports* software module by preparing the reports *LOAN-TR-01: Transactions for member - membership card No.* and *LOAN-TR-02: Transactions for member - ID No.* The privilege *RPT\_SPC – Special privileges* is required to use the new method.
- The option to use the **Unavailable material / Return, delete** method for quick material return without selecting the member and without opening the **Home library material** window is added. The option is activated at the request from the library with a special parameter. In libraries where a special parameter already closes the **Home library material** window after the material is returned, this option is already activated.

When returning the material without selecting the member after the new update, all controls are performed before the **Home library material** window is opened (e.g. existing reservations). In libraries where the **Home library material** window stayed open after the material was returned until now, the return confirmation is no longer required, because the return is performed immediately after reading the material identification number.

- In libraries with departments, only the material entered for the member in the department of registration is visible in the **Home library material** window. If a member has material entered at least in one department different from the department of registration, the note indicator *CIR* is displayed in the upper part of the **Home library material** window. The **Show** icon is now displayed before the *CIR* indicator. If you click this icon, a list of entered material in all departments is displayed. The list is displayed by default in the *Overview of entered material by all departments* display. Data display on entered material can be changed by selecting the default or user defined results display for unavailable material.
- The function of the **Field 996/997 / Adding/removing material for reading sets** method is updated. This method is used for marking material intended for various reading sets actions in libraries. After the material is included into the reading set, a reservation of available material with the status *material in the reading set* is performed. In the catalogue and COBISS+, this material has the copy status *reserved, material is in the reading set*. The information that the material is in a reading set is also visible in the **Insight into the library material status** window (**View** button in the catalogue and the **Field 996/997 / View** method). In the **List of reservations and cancellations of available material** window, the *material in*

*reading sets* display is added to the drop-down list "Display of the list of reservations". This display only allows the preparation of a list. The transactions 74 – *added to the reading set* and 75 – *removed from the reading set* are also added. **NOTE:** Material specified for reading sets before the installation of the new COBISS3 software version will have to be included into the reading sets again.

- The option for entering non-member visit of the reading room is added. Non-member visit of the reading room is entered with the class method **Member / Enter visit** by selecting the *Visit by non-member (reading room)* option in the **Enter visit window**. This causes the entry of the transaction 43 – *visit by non-member (reading room)* which is taken into account by default when preparing statistical reports *Calculating number of visits* (LOAN-STA-VT01 – LOAN-STA-VT07 and LOAN-STA-V10 – LOAN-STA-V20).
- A new restriction *Debt settlement disabled* can be selected in the member data editor. The restriction is set for a member who is under judicial recovery proceedings and therefore you want to automatically disable entering debts settlement. The member with this restriction also cannot settle their debts in My Library.
- The option for transferring reservations of unavailable material to other material is added. This option is used if you buy material for which you need to create a new bibliographic record because of a second edition; and because there are multiple reservations on the first material, you would like to transfer some of these reservations to the other material. Reservations can be transferred with the object method **Material / Transfer reservations to other material**. If you selected multi-volume material or material in multiple physical forms, you first need to select the reservations for individual material volumes or physical forms of the material. The **Transfer of reservations of material to the record for other material** window will open where you select the reservations for the transfer from the drop-down list for selected material (on the left) and transfer them by clicking the **Add** button. In libraries with departments, the list of reservations shows the reservations entered in the department you are currently logged into. The reservations on the list are sorted according to the time of entry. After you click the **OK** button, the **Search – Material** search window will open, where you search for the material to which you want to transfer the selected reservations. If there are available copies on the other material, reservations of available material are entered for the members (status O). How many reservations of available material will be entered when transferring reservations depends on the number of selected reservations for transfer and the number of available copies. If there are no available copies on the other material, reservations of unavailable material are transferred (status R). If there is already a reservation queue on the other material, the transferred reservations are entered at the end of this queue. The procedure for transferring reservations can also be used allocating newly bought copies to the same material. Reservations cannot be transferred for the following: serials, material in a set, and reservations entered in the procedure for interlibrary loan. When transferring a reservation of unavailable material the transaction 39 – *Manually editing the reservations list* is entered in the

transactions. Privileges *HLD\_CTD – Transfers, field deletion* and *LOAN\_RES – Editing list of reservations* are required to use the new method.

**NOTE:** Before transferring reservations it is recommended to check the number of reservations on the first and second material as well as the number of available copies on the second material.

- The option for setting the default loan period expiry date at the library department level is added. This option enables the school libraries to loan material at the end of the school year only up to a specific date. The expiry date is specified with the object method **Department / Loan expiry date**, same as for the textbook fund department. Expiry date set in this way applies to loan of all material in this department, regardless of the material type or any loan restrictions (e.g. 996/997p = 3 – *time restricted availability – 14 days*). The notification about restricted availability is displayed even if a different expiry date is taken into account so that the librarian can manually change the expiry date if needed.  
The option is activated at the request from the library with a special parameter. The library needs to specify the department that requires a unified loan period expiry date.
- The automatic sorting of price list items according to the debt/service code is added. When adding new items or deleting existing ones, they are automatically sorted within individual tabs.
- When searching in the catalogue, the option for displaying the data about the member who borrowed the material (membership card number, member name and surname) alongside the loan status. The display of member data is activated at the request from the library with a special parameter. The member data are displayed for material that has one of the following loan statuses: *c – outside loan, s – on loan (reading room), b – retained, l – lost, d – on interdepartmental loan, m – borrowed through ILL*.
- In the catalogue, tab **Field 996/997**, a new search field "Lending department" and a new search prefix HDP= is added.
- Automatic saving of the members list before and after changing class/grade prepared with the class method **Member / Change class/grade** is included. The saved reports can be prepared again in the *COBISS3/Reports* software module, in the folder *Reports / Standard / Loan*.
- The display of the class/grade can be included in the member data displayed on the overdue notice. For this purpose, a new variable value *class/grade* is added to the overdue notice data editor (method **Overdue notices / Create overdue notice forms**). The data is displayed on the overdue notice in the form of a code and value from the local code list *Class, class teacher (CODE 310)*.
- The publication year is added to the column *description of material* in the report *LOAN-MM-01: Members with entered material*.
- A tooltip is added to the **Attribute selection** button in the window for changing user settings and for monitoring and editing reservations of available material.
- Bug fixes:
  - in the display of loan status with the method **Field 996/997 / View** in a department which is not the parent department of the material;



- in the scheduled cancellation of batch deletion of inactive members;
- in the display of the creation date of unavailable material reservation in the **Home library material** window, for the reserved copy where the status changed from *R* to *O* because the reservation of available material was deleted for another member;
- in the reserved set completeness control during loan;
- in the return of material with restriction if the material was on loan in the reading room before that;
- in the control of the required permanent address of the member when exiting the **Member** editor by clicking **Cancel**;
- in the display of membership fee in the online membership renewal;
- in the display of the material title from the last overdue notice in the report *LOAN-EXP-01: List of uncollected debts*;
- in the report *LOAN-Mt-07: List of material without transactions / with transactions (by title)* if you search for the material with the COBISS.XX-ID; loan transactions that also have the part designation entered in the COBISS.XX-ID attribute are also included in the report from now on;
- in the sorting within the reports created when changing class/grade;
- in the loan of material that is already reserved for another member (the loan status of the copy is *O* or *W*);
- in considering the debt calculation method specified in the price list under the item for overdue notice – overdue notice debt is automatically entered when preparing overdue notices only if the calculation method *automatically* is selected in the price list item;
- in deleting a member if they have an e-book on loan – member deletion is not possible.

#### V6.25-00(03), 15 February 2020

- The option for receiving a copy of the welcome message when registering a new member to the e-mail address specified in the library for receiving copies of e-notifications is added. The option is activated at the request from the library with a special parameter.
- Bug fix:
  - in the control of data for e-notifications when reserving in COBISS+.

#### V6.25-00(02), 15 February 2020

- Bug fixes:
  - in the entry of cash register transaction when cancelling a settled debt with a calculated discount;
  - in the saving of an e-mail address in the **Member** editor, **Addresses** tab.

#### V6.25-00(01), 6 February 2020

- Bug fix:
  - in the entry of the transaction for e-book loan.



**V6.25-00, 1–2 February 2020**

- The option for calculating discounts when charging library services or debts. Discounts are calculated based on a list of discounts, in which you can specify different types of discounts. You can create a list of discounts with the new class method **Price list / Add new list of discounts**. The condition for creating the list of discounts is that the user has privileges to edit the price list and the existence of a valid price list. After selecting the **Price list / Add new list of discounts** method in a library with departments, you first select whether the list of discounts applies to the entire library or to individual departments, similarly as the price list. Then the **List of discounts** window will open, where you add a new type of discount by clicking the **New object**. In the window for entering the discount you specify the following:
  - name of discount (e.g. *8th February*), which should not exceed 20 characters
  - date or period of discount validity

If the discount is only valid for one day, enter the same date under "Valid from" and "Valid until" (e.g.: 8th February 2020). If the discount is valid regardless of the date, leave the parameters "Valid from" and "Valid until" empty.

- if the discount is valid every year on the same day or in the same period, mark the "Valid every year" with a checkmark (e.g. *8th February*)
- calculation method *manual* or *automatic*

Select the manual calculation method for discounts that will be calculated manually by the librarian (e.g. discount for library membership because of membership in a different association) and the automatic method for discounts which are valid for a specific type of debts on a specific date (e.g.: 50% membership fee discount on Library Day).

- discount rate
- types of services/debts to which the discount applies to  
By clicking the **Services/debts** button, you open a window where you select to which items on the valid price list the discount applies to.

After you save the new list of discounts, it has the status *in preparation*. You activate it with the object method **List of discounts / Define the list of discounts as valid**.

You can also create a new list of discounts based on the currently valid list with the object method **List of discounts / Copy to the prepared list of discounts**. When you activate the new list of discounts, the previously valid list of discounts gets the status *archived*.

The discount is calculated in the **Debts entry/settlement** window according to the calculation method specified for the individual type of discount. On the day when the discount is valid for debts where the discount is calculated automatically, the amount of debt is reduced by the discount. In the "Discount rate" column the

discount rate is displayed, and in the "Discount" the total amount of calculated discounts is displayed. The discount can also be calculated manually by selecting the debt in the **Debts entry/settlement** window and then selecting the type of discount in the list which opens after you click the **Discount** button. With this method you can calculate the discount only for services/debts and on the date as specified for the selected type of discount. If you close the **Debts entry/settlement** window after manually calculating the discount without also carrying out the debt settlement, the discount will no longer be displayed when you open the debts window again.

When entering the settled debt for a non-member, the discount can only be calculated automatically.

When settling a debt, the discount is only taken into account if the debt is settled on a day when the discount was calculated. If the discount was calculated, the invoice includes the discount rate and the price per item with VAT excluding the discount.

#### WARNINGS:

- The discount rate specified in the price list item is no longer taken into account when entering the debt so it is recommended you delete it.
- Currently, the discount can only be calculated when paying the debt in the library, the discount is not taken into account in online payments.
- On the list of entered material displayed as an appendix when issuing an invoice, loaned and reserved material is displayed separately.
- In accordance with the Slovene guidelines [Pravilnik o spremembi Pravilnika o zahtevah za računalniške programe in elektronske naprave, upravljanje in delovanje informacijskega sistema ter vsebini, obliki, načinu in rokih za predložitev podatkov \(UL RS, št. 77\)](#) the two data reports on issued invoices for cash payments are supplemented – file REPORT INVOICES HEADERS.TXT and file REPORT INVOICES ITEMS.TXT with data relating to the new tax rate of 5%. The data for both files can be prepared with 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.
- When preparing the report *LOAN-Mt-02: List of most requested material* the query parameters "Title" and "Author" are added (indexed by phrase, case-sensitive).
- In the report *LOAN-Mt-09: List of material without transactions (by copies)* the data on the copy is supplemented: in the second form (prepared for further processing) the data on the format and the running number are added.
- Bug fixes:
  - when processing a reservation of a serial, where another issue is allocated;
  - when cancelling an invoice for which a credit note has already been issued – cancellation not possible;
  - when loaning material in a set or at self-checkout if the member has this material reserved in another department;

- when communicating with a POS terminal in non-cash payments with an integrated POS-terminal in COBISS;
- when entering a transaction for e-book loan;
- when entering the transaction 52 – *change of data via COBISS+ and mCOBISS*;
- when taking the grace period into account for the preparation of overdue notices if the expiry date or the date of preparing a previous overdue notice is in the previous year;
- when checking for duplicates in the members database during the online registration with student identity;
- when printing outstanding debts on a lending form or an invoice if the debts were acquired when the library was using the COBISS2/Loan software module;
- when taking into account the parameter that specifies which reservation statuses allow a cancellation with the mCOBISS app;
- when de-accessioning lost material for a member who already received a final overdue notice for this material and is consequentially not allowed outside loan.

#### V6.24-00, 7–8 December 2019

- For a copy that was relocated from its original sublocation to another sublocation, the relocation sublocation (996/997e\E) is displayed for the call number in the **Catalogue** with the original sublocation ((996/997d\I) in brackets.
- When deleting lost material for the member, the late fee is charged if the validity date for status *L – lost* has already expired.
- When entering a new library member by transferring him/her from the students reference database, the data on citizenship is also transferred.
- The cancellation of a new member registration is disabled for members who already have an Urbana card registered (applicable to Ljubljana City Library that uses Urbana).
- In the message that is displayed when a copy is put on loan that is not available, because it is already on loan with this or another member, the title of material is displayed in addition to the accession number.
- When deleting member data, the option *changing school* is added as one of the reasons for deletion.
- Some messages that are displayed when returning material that were previously displayed in the Windows messages, are now displayed in a new window so that the person in the lending department wouldn't miss them. These are:
  - notification when returning material that is not available for loan,
  - notification when de-accessioning lost material where the list of reservations is deleted because there are no available copies in the library any more,
  - notification when de-accessioning lost material where the reservation of another copy of material is recorded, which is available unconditionally,
  - notification when returning material in a department other than the one it was borrowed from.

- When returning material with a restriction, a control of existing reservations was added. If there are any reservations, a warning is displayed that the material must have priority treatment.
- When renewing the library membership online, a control was added to check the age of members for the categories *001 – pre-school children*, *002 – primary school pupils* and *003 – secondary school pupils*. If the age of the member does not correspond with the category, it is not possible to renew the membership in My library.
- For a copy that is on loan for an indefinite period of time, it is not possible to select a reservation via COBISS+.
- In the *LOAN-Mt-09: List of material without transactions (by copies)* report, the data on the copy was updated: in the first form (prepared to be printed on the printer), the publication year was added, in the second form (prepared for further processing), the data on the publication year, the copy's status in holdings and the date of accessioning were added.
- The option of including pickup locations for the material was added. This is a new functionality that enables you to specify a pickup location for reserved material, from which the library member will collect it. This functionality will be included and updated upon request and in cooperation with each individual library that would like to enable their members to collect material from various locations (in the library or from other departments).
- Entering loan transactions has been updated with the following data:
  - member details: member age, mobile library stop (where the member joined), university in eVŠ, members group;
  - material and holdings data: shelving UDC (from 996/997d\u), shelving location (from 996/997o), acquisition type (from 996/997v), financier (from 996/9974), physical form, title, author, record designations (from 992b), form of contents code (from 105b), sublocation (from 996/997d\l), collection, classification of non-fiction material, original record COBISS.XX-ID (from 001xv);
  - reservation data: reservation processing spot, reservation pickup location.

The new data will be recorded in the transaction files after the installation of version V6.24-00; the data will not be collected in retrospect.

Use of new data:

- when using the data export tool, it will now be possible to select this data from the list of attributes for the record; it will also be possible to form a query based on it,
  - when creating statistical reports, where the transactions search window opens, this data is added to the list of search fields.
- Bug fixes:
    - when displaying text on the signature pad, if the text is several pages long;
    - when searching for members in the **Members** search window by the "No. of visits per year (l)" search field;

- when updating the note for the library department;
- when displaying the note in the *LOAN-CRO-02: List of invoices incl. VAT* report;
- when displaying the call number in the *LOAN-Mt-09: List of material without transactions (by copies)* report;
- when displaying the call number on the catalogue card;
- when renaming the "Sublocation" attribute – because the sublocation relocation is entered in the attribute (if it is entered in subfield 996/997e\E) this attribute is renamed to "Current sublocation (d\l, e\E)";
- when recording the transaction *18 – return with restriction*, if the member returned the material at another department;
- when displaying the number of members subscribed to push notifications, in the list that is created by using the **Electronic notification / List of members with data for e-notification** method;
- when entering the loss of material, the selection of the option ON LOAN in the **Status selection** window is disabled, if the copy has the status *C – outside loan*;
- when batch deleting expired reservations for material that is a part of a set, if there is a reservation queue for it;
- when renewing the loan period in My library for material, for which a loan fee is charged automatically – loan renewal is disabled;
- when renewing the loan period for all recorded material at the self-checkout – if the last date for returning the material is before the estimated renewed loan period expiry date, the loan renewal is successful (previously it was displayed that the loan period renewal was unsuccessful). An additional notification that the loan period was renewed for a shorter period of time, will be included in the next version.

#### V6.23-01, 12 September 2019

- When creating a registration form with the **Registration form** button in the **Member** editor, the option was included to select from several registration form user definitions, if that is listed for the parameter that enables taking into account report user definitions.
- Bug fix:
  - when naming the member restriction – because the restriction *Self-checkout denied* disables the loan and loan period renewal at self-checkout, but not also the return of material at self-checkout, the restriction was renamed to *Loan at self-checkout denied*.

#### The inclusion of the new method for saving loan transactions enables the following:

- Preparing lists and statistical reports based on entered loan transactions is possible in the COBISS3 software also for the period when the library was using the COBISS2/Loan software module.
- This is possible for the following lists and groups of statistical reports:
  - *LOAN-Mb-04: Deleted members*
  - *LOAN-Mb-05: Members - changed details*

- *LOAN-Mb-09: Active members*
- *LOAN-Mt-01: Material by transaction*
- *LOAN-Mt-02: List of most requested material*
- *LOAN-Mt-06: Loan of serials*
- *LOAN-Mt-07: List of material without transactions / with transactions (by title)*
- *LOAN-Mt-09: List of material without transactions (by copies)*
- *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-05: Members with highest number of loans*
- Statistical reports in folders:
  - *Statistics/Loan of material*
  - *Statistics/Transactions*
  - *Statistics/Calculation of no. of visits*
  - *Statistics/Active members*
- Statistical reports in the folder *Statistics (user classifications)*
  - *Members*
  - *Calculation of no. of visits*
  - *Transactions*
- Reports in the folder *Data for further processing*:
  - *LOAN-EXP-03: Material by transaction*
- Data export software
- When analysing loan (**Unavailable material / Material loan analysis** method) only the transactions that were entered in the COBISS3/Loan software module are taken into account.
- The subfolder with the reports for calculating the number of visits was renamed from *Visit* to *Calculating number of visits*.
- Using the transactions groups in the loan transactions code list:
  - *901 – transactions with material in the library*, which includes the following transactions: 11, 12, 13, 14, 16, 17, 18, 19, 20, 21, 22, 25, 28, 41, 47;
  - *902 – transactions with material COBISS+ and mCOBISS*, which includes the transactions: 63, 64, 65, 66, 67;
  - *903 – transactions with material in the library, COBISS+ and mCOBISS*, which includes the transactions: 11, 12, 13, 14, 16, 17, 18, 19, 20, 21, 22, 25, 28, 41, 47, 63, 64, 65, 66, 67;
  - *904 – outside loan and loan renewal*, which includes the transactions: 11, 16, 21, 26, 66;
  - *905 – transactions for the calculation of the typical weak for counting loan*, which includes the transactions: 11, 12, 16, 21, 22, 26, 66;
  - *906 – transactions for the calculation of the typical weak for counting visits*, which includes the transactions: 01, 02, 03, 06, 07, 11, 12, 13, 14, 16, 17, 18, 19, 20, 21, 22, 24, 25, 26, 29, 31, 32, 52, 63, 64, 65, 66, 67.

If you select an individual group of transactions when preparing lists or statistical reports, all transactions included in the individual group will be taken into account when preparing the report.

- The **Unavailable material / Specifying a typical work week** method enables you to specify a typical work week for loan and visits. You can specify a typical week for the entire library or for individual departments. If you want to specify a typical week for the entire library, do not select any departments. After the procedure is completed, the **Specifying a typical work week** window will first show the data for the calculation of a typical week for outside loan and the information about which week is typical for loan. Then the data for calculating a typical week for visits is displayed and the information about which week is typical for visits.
- Calculating data for specifying a typical work week can be time consuming so we recommend that you carry out this process at the end of working hours.
- Specifying the library material turnover is enabled by the **Unavailable material / Define material turnover** method with the formula:
  - $$\text{Material turnover} = \frac{\text{number of loan transactions}}{\text{number of material copies}}$$
- After selecting the method, specify the year for which you want to define material turnover (current year is specified by default). Then find the fields 996/997 that should be taken into account for turnover specification. By clicking the **Select** button you select all of the fields 996/997 found in the search window (you do not need to load and highlight them). The transactions of outside loan and loan renewal (11, 16, 21, 26, 66) are taken into account automatically. Once the procedure is complete, a window for saving the report will open, where you will enter the report name. The report is saved in a text file and the data is separated by the "|" character. You can import the data into other tools (e.g. Excel) for further processing. The report contains the following columns:
  - acquisition type;
  - sublocation in call number;
  - UDC open access;
  - three columns: one for the last 10 years of material accessioning, one for material accessioned before this period, and one for all material combined; these columns contain the following:
    - number of material copies on the day of creating the report (the column name contains the accessioning year or the designation *older*, or the designation *total* and after that the designation *hol*),
    - number of loan transactions on the day of creating the report (the column name contains the year of loan transaction or the designation *older* or the designation *total* and after that the designation *hol*),
    - material turnover (the column name first contains the year of loan transaction or the designation *older* or the designation *total* and then the designation *turnover*);
  - calculating the turnover assessment (the assessment equals the turnover divided by the turnover average times 10 (assessment 10 is average)).



- The end of the report contains the summary data by acquisition types, sublocations and UDCs.
- Description of reports:
- The report *LOAN-Mt-07: List of material without transactions / with transactions (by title)* in the subfolder **Lists / Material** enables you to prepare lists of material with no entered selected transactions in the selected period and lists of material with entered selected transactions. When preparing the list, the search window **Search - Bibliographic record** where you select the material you want to include in the list is opened first. Then you specify which transactions you want to take into account when preparing the list, the period of entering these transactions and the department of transactions.
- When the list preparation is complete, four more forms (reports) are prepared:
  - *List of material without transactions (by title)*,
  - *List of material with transactions (by title) – first 100*,
  - *List of material without transactions (by title) – for further processing*,
  - *List of material with transactions (by title) – for further processing*.
- The reports of the first two forms are print ready. In the form *List of material without transactions (by title) – for further processing* the data is created in a text file and is separated with the "|" character. Save the form to the appropriate location by clicking the **Save as** button. You can import the data into other tools (e.g. Excel) for further processing. The form *List of material with transactions (by title) – for further processing* is prepared so that you can save it as an Excel workbook with the appropriate version of the Adobe Acrobat program.
- The report *LOAN-Mt-09: List of material without transactions (by copies)* in the subfolder **Lists / Material** enables you to prepare lists with copies of material with no entered selected transactions in the selected period. When preparing the list, the search window **Search - Field 996/997** where you select the copies that you want to include in the list is opened first. Then you specify which transactions you want to take into account when preparing the list, the period of entering these transactions and the department of transactions.
- When the list preparation is complete, two forms (reports) are prepared:
  - *List of material without transactions (by copies)* and
  - *List of material without transactions (by copies) – for further processing*.
- The report of the first form is print ready. In the second form, the data is created in a text file and is separated with the "|" character (for further processing, see the description of the *LOAN-Mt-07* report).

#### V6.23-00(03), 3 September 2019

- Bug fix:
  - when registering members in a library that uses a joint members database.

#### V6.23-00(02), 31 August 2019

- Bug fix:

- when displaying the total amount of unsettled debts in the "Debts" member attribute.

#### V6.23-00(01), 22 August 2019

- Bug fix:
  - when loading the reference students database.

#### V6.23-00, 21 August 2019

- In the report *LOAN-Mt-02: List of most requested material* the material data is supplemented with data on place of publication, publisher and publication year.
- Bug fixes:
  - the entry of MSISDN mobile phone number is expanded with the option for entering a telephone number that does not have a Slovene international call code (applies to Ljubljana City Library, which uses Urbana);
  - when entering a cash register transaction for issuing a credit note if the debt was settled in another department than the one where it was entered;
  - when selecting a superior member in the **Member** editor for the member of the category *019 – family card*.

#### V6.22-00(06), 16 July 2019

- The option for batch deletion of inactive members in libraries with a shared members database (e.g. KISUM) is included.
- Bug fix:
  - duplicated class methods in the Home library are removed: **Time parameters**, **Calendar** and **Loan type (pq table)**.

#### V6.22-00(03), 29 June 2019

- Bug fix:
  - in entering a debt because the reserved material was not collected when deleting expired reservations.

#### V6.22-00, 8–9 June 2019

- The method **Field 996/997 / Adding/removing material for reading sets** intended for marking material for various promotions of reading sets in libraries is added. It is not possible to reserve the material in the reading set in the COBISS3/Loan module or via COBISS+. A librarian or COBISS+ user receives the message that the material is a part of the reading set. When you lend a copy of such a material, it is no longer marked in the *In reading set* attribute that the copy is a part of the reading set. Accession numbers of the material on loan, material with certain holdings statuses or availability level (p) 6 or 7 cannot be added in the reading set.
- The service of notifying new library members when IZUM registers members from the file, which is used primarily for school libraries, is added. When becoming a library member, the member receives a welcome message from the COBISS system to his/her e-mail address. The message is sent if the e-mail address for e-

notifications was entered for the member into the file and no password was specified for My library. The message includes the links to the page for setting the password for using the My library service and with information about which functions and services are available in the COBISS.SI system.

- Mobile phone number is added to the list of attributes that appears in the browser for a member on the workspace.
- In the **Signature pad** window, it is possible to use the **Enter** key to select the button with the focus.
- In **Catalogue** it is possible to display a slip with details about selected items of the material simultaneously for several items by highlighting the items in the list of hits; by means of the <Shift> key and by clicking the **View** button, the slips are displayed. The call number in the slip appears in bold and in larger fonts.
- On the form of the report *LOAN-Mb-10: Notification about outstanding debts* used for sending by regular mail, the position where the addressee (member) appears changed so that it is now adjusted to left-window envelopes, in the column "Department", the department name appears instead of the numeric identifier.
- A new report *LOAN-Mb-12: Statistics of members signed up for e-notifications* is prepared, enabling the creation of statistical reports of members signed up for different types of e-notifications. The report is added in the **Lists / Members** subfolder. When creating the report, the **Search – Member** search window opens first, where you can select all the members or only some members who you wish to be included in the statistical report.
- Reports *LOAN-MM-03: Members and loan period date about to expire*, *LOAN-MM-04: Notification about a loan period expiry date (mail)* and *LOAN-MM-05: Notification about a loan period expiry date (e-mail)* are supplemented with the number of days of delay. The number of days of delay up to the date when the report was created appears.
- Under the query parameter "Transaction", transaction *56 – membership renewal via COBISS+ or mCOBISS* is added among default transaction types. The following groups of statistics are updated: *Statistics / Active members*, *Statistics (user classifications) / Members* and *BibSiSt (NUK – CeZaR) / ... / Members*.
- Bug fixes:
  - in the display of the number of days of delay in the **Home library material** window when the library is closed for a longer period of time according to the calendar during the transition into the new year;
  - when considering the grace period for calculating fine for the material placed on reading room loan (S status) – the grace period is not considered;
  - in relation to how fast the procedures are carried out in the **Home library material** window;
  - when returning material via RFID with the method **Unavailable material / Return, delete**, the message appears now that the item has the holdings status *8 – lost* or *9 – de-accessioned* instead of the message that the loan status of the item is *available*;

- when entering reading room loan with the method **Field 996/997 / Enter transaction with material in reading room** if the library uses RFID;
- when calculating the debt for a higher overdue notice if the member returned some of the items of the material from the overdue notice after he had received the previous overdue notice but has not settled the debt;
- when entering the debt manually for which the item with the price EUR 0.00 and the calculation method *manually* are specified in the price list;
- in case of non-cash payment with the POS terminal integrated into COBISS under the attribute "Type of non-cash payment" and when entering the payment card type (the data returned by the POS terminal is entered also if the data is not in the code list *Type of non-cash payment*);
- when cancelling non-cash payment on the POS terminal (if integrated into COBISS);
- in case of non-cash payment with the POS terminal integrated into COBISS if there was a communication error;
- when displaying invoice if you close the window for preparing another display before you confirm the warning about the open window;
- when sorting invoices in the report *LOAN-CRO-02: List of invoices incl. VAT* (invoices are sorted by transaction time);
- when changing the expiry date manually in case of a serial that is reserved;
- when searching for material in the catalogue; if you are searching in the parent department for items placed on interdepartmental loan, the information about the number of all reservations for this material in the parent department now appears as well;
- when displaying the loan status while searching in COBISS+ for the material retained in the department due to the return in a department that differs from the department of lending the material;
- when assigning another available item of the material than reserved by the member as the reserved item was not found during the reservation processing;
- when displaying member details under the **Info** tab;
- when sorting notes for the member in the browser – the most recent note appears first;
- when considering a member who changed the membership card number in the period for which the report *LOAN-Mb-02: Active members* was prepared so that the member appears only once under the currently valid membership card number;
- in case of online member registration when the member entered a postcode for a city abroad into the web form but the postcode also exists in the Slovenian list of postcodes;
- when sorting members without the date of birth entered in the table *Active users by age by year of birth (Statistics LOAN-BibSiSt: Library members)*;
- when cancelling reservation via the My library service for unavailable serial issue (Status *R*) in a mobile library department;

- when selecting attributes to view reservations (user settings under reservation of available material processing spots);
- when transferring reservations of unavailable material (status *R*) while transferring holdings to a record for another material if the library's loan is organised by departments;
- when lending serials if the restriction of the number of issues placed on loan is specified.

**V6.21-00(08), 13 April 2019**

- Bug fix:
  - concerning the speed of procedures in the loan module.

**V6.21-00(07), 4 April 2019**

- Bug fix:
  - when saving input parameters for the report *LOAN-Mt-07: List of material without transactions / with transactions (by title)*.

**V6.21-00(06), 30 March 2019**

- Bug fix:
  - when sorting fields 996/997 for calculating the material turnover.

**V6.21-00(05), 25 March 2019**

- Bug fix:
  - concerning reservations of material.

**V6.21-00(04), 22 March 2019**

- Bug fixes:
  - concerning the speed of procedures in the loan module;
  - when reserving material with status *B* in department.

**V6.21-00(03), 21 March 2019**

- Bug fix:
  - in case of expert search when using the method **Unavailable material / Define material turnover**.

**V6.21-00(02), 19 March 2019**

- Bug fix:
  - when recording transactions performed within one second, in the Elastic tool.

**V6.21-00, 16–17 March 2019**

- In the **Services/debts – group** editor on the price list the entry of gross price or price per unit incl. VAT is enabled when entering the price to the nearest hundredth. The net price ("Price per unit" attribute) is calculated automatically according to the selected turnover type for VAT return.

- This means that "Price per unit incl. VAT" is always displayed to the nearest hundredth: on the price list, in entered debts, in cash register transactions, etc.
- In the debts that have already been entered "Price per unit incl. VAT" is not displayed if this attribute was not entered in the individual price list item when entering the debt.
- 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 or goods, all sub-total amounts are calculated based on the net prices rounded off to the nearest ten-thousandth. That is why all net prices per unit, entered debts, cash register transactions, as well as amounts for debts settlements and for creating an invoice are rounded off to the nearest ten-thousandth. The invoices, credit notes and invoice cancellations include the price, value of goods or services, calculated VAT, payable amount and return amount rounded off to the nearest hundredth.
- **NOTE:** After installing the new version of COBISS all libraries **must** check the items on the price list and **enter** the gross price ("Price per unit incl. VAT" attribute) according to the official price list. If the price list is not edited accordingly, we will disable access to the **Entering and settling debts** window for individual members or the access to the **Debts settlement for non-members** window.
- For non-cash transactions using the integrated POS terminal in COBISS you no longer need to select the payment card type in the attribute "Type of non-cash payment" – the first appropriate card is selected from the code list *Type of non-cash payment*. If you enter the data manually, this data is taken into account.
- For specific class methods the option for using keyboard keys without prior class selection is added to the browser window. By pressing a key, you can execute the following methods:
  - <I> = **Member / Home library material**
  - <V> = **Unavailable material / Return, delete**
  - <K> = **Material / Catalogue**
  - <E> = **Member / Enter visit**
  - <O> = **Department / Transition to another department**
  - <M> = **Reservation processing spot / Monitoring and processing reservations of available material**
  - <N> = **Invoice / Enter debts settlement for non-member**
  - <Y> = **Cash register balance / Open cash register drawer**
- In the browser toolbar you can add a button for quick access to the class method **Field 996/997 / View** by using the **Setting the toolbar** option (right click the mouse in the toolbar).
- The search is updated with the **Member / Search by key** and **Member / Home library material** methods; these methods now include the search by attributes "Membership card number", "Alternative number", "Name", "Surname", "Guardian/guarantor" and "Notes:".

- If there is no number entered in the search request, the search is executed by the attributes "Name", "Surname", "Guardian/guarantor" and "Notes". However, if there is a number in the search request, the search is executed by membership card number or alternative numbers.
- 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.
- When the software searches by keywords, text search is added (you can enter a space or punctuation marks .,;- between two or more words, and the search will only take into account entered words without the 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 request).
- The default order of the search fields is changed in the search window **Search – member** (first eight): "Keywords", "Membership card number", "Category", "Class/grade", "Date of birth", "Guardian/guarantor", "Permanent residence municipality", "Members group". The change is only visible for the users who have not changed the default setting by clicking the **Save query** button until now.
- At the request from the library, IZUM includes the parameter, which enables the members to renew their membership in My library (COBISS+). The library can restrict the use of the new service only to members of a specific category (e.g. categories where the membership is charged automatically according to the price list). After logging into My library, the members can renew their membership by clicking **Membership renewal** button that appears if the membership already expired or it expired less than 1 month ago. The membership is renewed for a period in accordance with the settings for membership validity in the library. If the membership already expired, it is renewed to the current date, otherwise it is renewed to the date of the last membership renewal. If the membership fee is charged automatically, the debt for the membership fee according to the price list is also entered. The member can settle the entered membership fee debt at once if the library enables online payments in My library. Online membership renewal is entered as transaction 56, based on which you can monitor the use of the new service when preparing reports.
- The service for notifying new library members is added. When registering in a library, the member receives a welcome message to their e-mail from the COBISS system. This happens only if the member entered an e-mail address for e-notifications when registering and the password for My library has not been set. The member also receives a message when changing the e-mail address in the library if the password for My library has not yet been set. The message contains a



link to set the password for using the My library service and a link to information about the functionalities and services offered by the COBISS.SI system.

- The **List of undelivered e-notifications** method is added to the **Notification** class. You can use this method to view up to 100 undelivered e-notifications in the current day up to the moment of executing the method. If there are more than 100 undelivered e-notifications, the software suggests that you use the search window of the **Notification** class. The software also informs you if there are no undelivered e-notifications.
- At the requests from the library IZUM includes a parameter that enables the librarian to reserve available material copies for members that have loan disabled because of outstanding debts (by entering/scanning the accession number in the **Home library material** window or by selecting the material from the catalogue). The parameter has no effect on the reservations regime via COBISS+.
- If the member reserved available material that is already waiting for them in the library (the material status is *W – waiting on the shelf (reserved)*) and you **loan a copy for the reading room** that belongs to the same bibliographic record to the member, the reservation of the available material waiting for the member in the library is not deleted.
- If you select nothing in the window for selecting material to continue the process (e.g. deleting reservation), the **OK** button is disabled, which is also indicated by the auditory signal. You can continue the procedure only by making a selection or cancelling (**Cancel** button).
- In the **Insight into the library material status** window the accession number, call number and the status of the loaned copy are also displayed for available material copies when using the **View** method.
- The option for saving statistical reports in Excel (.xls) format is added. After you create a statistical report, click the **Save as** button in the **Preview and send report** window to specify where to save the file and select the option *Excel Files[UTF-8] (.xls)* under "File type".
- At the request from the library, IZUM includes a parameter that enables reservation data in the reports to be sorted so that the reservation validity expiration date is at the top of the report, followed by the reservation date, reservation processing spot, member data and member notification data, reserved material data, and library or department data. A different data sorting is enabled on the card with reservation data and on the lending form for newly received material reservation.
- Bug fixes:
  - in displaying data on the loaned copy status (**View** button); from now on, in libraries with departments, the list of reservations of the material reserved also for other members is first displayed in the department you are logged into (or in the selected department if you are viewing the data in the **Catalogue** window) and then the list of reservations in all other library departments, where the material was also reserved;

- in transferring reservations of unavailable material when transferring holdings to a record for another material; if you transfer a loaned or reserved available material copy, the list of unavailable material reservations is not changed for the material from which you are transferring the holdings provided there is at least one copy for this material available with or without restrictions; otherwise reservations of unavailable material are also transferred to the record for other material;
- in searching members with outstanding debts;
- in partial debts settlement;
- in non-cash payments with integrated POS terminal in COBISS you no longer need to confirm the transaction on the POS terminal;
- in cash register transaction when issuing a credit note *cash payment* is entered in "Payment method";
- in updating attributes "Modified by" and "Modified" in the field 996/997 when deleting a lost copy from member's records and entering the status and loan restriction in the holdings data;
- when returning material with the **Unavailable material / Return, delete** method the message that the copy has the holdings status 8 – *lost* is displayed from now on instead of the message that it has the status *available*;
- in displaying data on loaned copy status for items of the set when using the class method **Field 996/997 / View**;
- in displaying contact data in the notification about received reserved material – the data of the department where the reserved material is waiting for the member is displayed (applies for libraries with departments);
- an empty line before the library department name is added to the form for the notification about loan period expiration date via e-mail;
- in retrieving appropriate code lists for school name, class/grade and course of study according to the selected school type;
- in loan of serials if the parameter for automatic return is included for the member who has this material on loan (applies to some school libraries);
- in online material reservation the reservation in the host department is entered in the host department when selecting available material (applies to libraries with departments);
- in entering the membership card number when registration of the personalized Urbana card created outside the library (applies to the Ljubljana City Library, which uses the Urbana card);
- in issuing a duplicate of the Urbana card if the Urbana card number (CUID) is already blacklisted (applies to the Ljubljana City Library, which uses the Urbana card);
- in returning material at self-checkout if the material is reserved for ILL.

#### V6.20-01, 23–24 February 2019

- New statistical reports for loan were prepared. They comply with the data from the BibSiSt questionnaire that libraries in Slovenia must complete as a part of the statistical measurements carried out by the Centre for Library Development (NUK

- CeZar). The definitions for the new statistical reports can be found in the **Reports / Standard / BibSiSt (NUK – CeZaR)** folder and are divided into four groups by library type as follows:
  - school libraries,
  - university libraries,
  - special libraries,
  - public libraries.
- Two statistical reports are prepared for each group, one for active library members and one for loan of material.
- The new report *LOAN-MM-09: Members and loan period date about to expire (without material data)* was prepared. It enables the preparation of a list of members with material on loan, for which the loan period expired or is about to expire. The report was added to the **Lists / Members and material** subfolder and is similar to the report *LOAN-MM-03: Members and loan period date about to expire*, but it does not contain data on the material on loan. When creating the report, you can specify the beginning and end of the period, the department or grade of the member, the member category and study programme. In libraries with departments you can create a list for each department by entering the "Library department" parameter. If you do not specify the parameter, the list will be created for all departments.
- For the purposes of university and higher education libraries, two new statistical reports were added for displaying the data on the number of active members, sorted by university, member category or university in eVŠ. If you wish to get the data on the member category from loan transaction files, create the *LOAN-STA-Mb12: By university/member category/university in eVŠ* report in the **Loan / Statistics (user classifications) / Members / Members (member details from loan transaction files)** folder. If you wish to get the data on the member category from the members database, create the *LOAN-STA-Mb12: By university/member category/university in eVŠ* report in the **Loan / Statistics (user classifications) / Members / Members (member details from the members database)** folder.
- Within the COBISS3/Reports software module, we removed the statistical reports linked to the migration of libraries to the COBISS3/Loan software module:
  - *LOAN-STA-A05: By member category (after the year of transition to COBISS3/Loan)*,
  - *LOAN-STA-A06: By member category (for the year of transition to COBISS3/Loan)*,
  - *LOAN-STA-A07: By university/member category/university in eVŠ (after the year of transition to COBISS3/Loan)*.
- Correction regarding the calculation of the number of active members in statistical reports, if the member received a membership card with a new membership card number during the selected period.

#### V6.20-00(08), 5 January 2019

- Bug fixes:

- when entering the transaction 27 – *updating note about the material*, if the note about the material contains Enter;
- when doing non-cash transactions using the integrated POS terminal in COBISS when using foreign credit cards for payment.

#### V6.20-00(07), 20 December 2018

- Bug fixes:
  - when returning serials that were entered with the status *B – retained*, for a department using the **Unavailable material / Return, delete** method;
  - when refreshing data in the **List of reservations and cancellations of available material** window;
  - when creating a registration form by using the **Registration form** button in the **Member** editor, the user report definition is considered, if it is specified by a parameter;
  - when specifying the attribute "Turnover type for VAT calculation" in the price list, if the library is not liable to VAT/tax.

#### V6.20-00(06), 17 December 2018

- Bug fixes:
  - when doing non-cash transactions using the integrated POS terminal, the **POS terminal** window can be closed by using the Enter key;
  - when recording errors during interruptions when refreshing data in the **List of reservations and cancellations of available material** window.

#### V6.20-00(05), 12 December 2018

- Bug fix:
  - when recording procedures in the mobile library.

#### V6.20-00(04), 11 December 2018

- Bug fix:
  - when automatically entering the membership fee for libraries that also charge membership fees to members under 18 year of age.

#### V6.20-00(03), 4 December 2018

- Bug fixes:
  - in sending messages to a library about reservations via COBISS+;
  - in the use of the signature pad.

#### V6.20-00(02), 1–2 December 2018

- Bug fixes:
  - when returning material and renewing loan at self-checkout;
  - when sending general notifications to members;
  - in transaction designation when renewing membership with the manual entry of the membership fee debt;

- on the report *Slip with reservation details* the member telephone number entered in the addresses of the member is displayed if the member is not subscribed to e-notifications about availability of reserved material, even if the parameter is not activated in the library;
- in checking for duplicates when registering a new member.

#### V6.20-00, 24–25 November 2018

- In the categories of members with the obligatory entry of name and surname of the guardian/guarantor the entry of the guardian/guarantor postal address is also checked automatically.
- At the request of the library IZUM includes the parameter that excludes the software control of the member age for the categories *001 – pre-school children*, *002 – primary school pupils* and *003 – secondary school pupils*.
- The option for editing the note about member is improved:
  - the option for accessing the note editor is added in the **Home library material** window by clicking the edit icon before the content of the note is printed;
  - in the **Note** window, the default setting is entering a new note;
  - individual notes in the **All notes** window are sorted from newest to oldest, depending on the date and time of entry;
  - you can select an individual note by clicking the text in the **All notes** window;
  - in the **Note** window, a new button **Remove** is added for removing the selected note;
  - if the member has an entered note, a part of the note content is displayed under "Note" in the **Member** editor.
- In the window for monitoring and processing reservations of available material you can select multiple reservations cancelled via COBISS+ at the same time and conclude their processing in the *reservations cancellations* display from now on.
- The **Entered debts / Batch deletion of debts** method is added. It is intended for deleting some non-current or legally outdated debts. If you have the local code list *Reasons for deletion/writing off debts (CODE 317)* specified in the library, also specify the reason for deleting the debt in the process of batch deletion of debts (before you execute this method for the first time, update the mentioned local code list if needed).
- The functions of the signature pad are updated:
  1. Display of member data and member statements on the signature pad  
The functions are still divided into two steps, but the procedure in the first step is updated, so that the text from the member statement can now also be shown on the signature pad besides the member data. You can also adjust the displayed member data. After you execute the **Home library / Text for signature pad** method, the **Text for signature pad** window will open, where the attributes for displaying member data on the signature pad are set by default. If you do not wish to display all the data on the signature pad, you need to delete the entire line for a specific piece of data (e.g. *Gender: %gender%*). If the data is not entered for the member, the name of the attribute is not displayed on the signature pad, even though the line stays entered in the attributes list.

In the **Text for signature pad** window you also need to edit the member statement text, which is usually edited in the user variable *Member statement on the registration form* (the variable is copied to the user definitions from the folder *Variables/Standard/Loan/Member statement on the registration form*). We recommend that you copy and paste the text into the **Text for signature pad** window so that the texts on the display of the signature pad and in the created report *Registration form* are identical. If you want to have the text on the signature pad before the member data, you need to add it in the window before the list of attributes and also insert <page> in a separate line for an appropriate page break on the signature pad. If you want the text of the statement on the signature pad to be after the display of member data, you need to add it to the window after the list of attributes and insert <page> in a separate line for a page break. In this way the member on the signature pad can freely be moved on the list of displayed data and text. After you click the **OK** button, you save the entire contents and test the display of data on the pad. If you discover that e.g. the entire text of the member statement is not shown while testing the displayed data on the signature pad, you need to edit the place of the page break for the deleted text by inserting <page> in the line which is the last visible on the signature pad after you move the arrow on the pad to the end of the displayed page. You can also logically edit the page break of the statement in the paragraph above when dealing with longer texts. The function of entering the signature in the second step of the procedure for using the signature pad remains unchanged.

2. Additionally, the following data is displayed on the signature pad:
    - *Level of education*
    - *University in eVŠ*
    - *Name of school*
    - *Employment*
    - *Guardian/guarantor name*
    - all entered postal addresses of the member (from the *Addresses* tab)
    - all entered telephone numbers of the member (from the *Addresses* tab)
  3. The signature pad no longer requires the HID-Driver made by the company Signotec to function. If the driver is already installed, you can remove it from your workstation or leave it installed because it has no effect on the functioning of the signature pad. The pad only needs to be connected to the USB port.
- For the purposes of statistical reports, a new classification *municipality\_4 (static; some municipalities)* is added to the folder **Classification / Standard / Loan / Municipality**. It is intended for creating user defined classifications when you want to show data only for some municipalities.
  - A new reports group is prepared for calculating the number of active members (**Reports / Standard / Loan / Statistics (user definitions) / Members**) saved in the new subfolder **Members (member details from the members database)**. The classification of data according to the member properties (e.g. member category) in this statistical group is based on the member data in the current members database. The statistic *LOAN-STA-Mb08: By department/gender/age* is also moved



to this subfolder because the current state in the members database is taken into account when classifying data by age and gender.

The definitions of statistical reports where the classification of data is based on the member properties at the first occurrence of the transaction which is taken into account in the calculating the statistic of active members are moved to a new subfolder **Members (member details from loan transaction files)**.

- A new report *LOAN-Mt-08: List of material with the No. of all copies and loaned/reserved copies* is created, which shows the list of material (e.g. sublocations for the textbook fund) or an individual title with the number of copies (de-accessioned copies are excluded) and the number of loaned or reserved copies. When creating the report, the data can be found in the search window of the fields 996/997 and the individual title can be found by using the **Expert search** button with the search prefix TI=.
- A new report *LOAN-CRI-05: List of invoices – blank* is created that can be used when needed if there were no entered payments on a specific day. When creating the report, you need to specify a date and in libraries with departments you can also specify the department.
- The display of details is added to the report *LOAN-EXP-06: List of members' debts* because the title or the material, accession number and the overdue period are displayed in the fine. At the end of the list, the dates of the last member visit are also displayed. After you import the data into an Excel worksheet, you sort it by membership card number.
- On the report *LOAN-Mt-07: List of material without transactions / with transactions (by title)* the sum of the number of transactions is added to the fourth form (report) *List of material with transactions (by title) – for further processing* at the end of the list.
- Bug fixes:
  - if the control for the loan of the last issue of the current volume or the last available issue is activated in the library, this control is performed for all issues of the volume from now on;
  - in processing a reservation of available material for interlibrary loan if you scan/enter the identification number (accession number or loan number) when completing the reservation processing (**End processing** method) or when preparing the material for collection (**To shelf (W)** method);
  - when calculating the date of the expected return if the loan was renewed via COBISS+ for a copy in interdepartmental loan (the renewal deadline specified for the host department is taken into account);
  - when checking reservations and loaning material into the reading room; if the member reserved unavailable material (the material status is *R*), and you **loan the material to the member for the reading room** (the material status is *S*) the reading room copy that belongs to the same bibliographic record, the reservation of unavailable material is not deleted;
  - when cancelling the reservation of unavailable material via COBISS+ in the selected department if the member that cancelled the reservation already reserved this material in other departments;



- when cancelling the reservation of available material already reserved for another member via COBISS+;
- if there are also reservations of unavailable material (the material status is *S*) for a specific material despite the fact that there are copies available for loan and you loan the available copy to the selected member, the software message that this copy is reserved for a member who is the first on the list of reservations for this material is no longer displayed;
- when automatically updating the member category during the download of the records from a reference database of students (besides the mode of study the study programme *eVŠ* is also taken into account from now on);
- when e-notifying about membership expiry in the case of many notifications;
- when saving the attribute "Type of school" in the **Member** editor in the KISUM databases. The incorrectly set data *primary school* will be deleted in some KISUM databases after the version is installed;
- after using the **Unavailable material / Return, delete** method for the material reserved in another department, the information on the department, where the material is on loan, is displayed instead of the message that it has the status *available* in loan;
- when entering the transaction 2 – *change of member data* if the attribute is changed in the **Member** editor.

#### V6.19-02(01), 25 October 2018

- Bug fixes:
  - removed prefix *TI=* in front of the title on the lending form;
  - format of the attachment with the list of cash register transactions changed to *.txt*;
  - when students register online with student identity;
  - when performing the task that makes it possible to daily refresh member details, which are used to access information resources.

#### V6.19-02, 23 October 2018

- The notification about membership expiry in cases when the membership fee is not charged (the question *Do you wish membership validity to be entered automatically?*) now also includes the member category.
- When registering online, the check for duplicates in the members database is now only performed for the forename, surname and date of birth. The e-mail address is no longer checked.
- At the request from the library, it is possible to enable daily sending of the list of cash register transactions for the previous day to a specified e-mail address in a form, suitable for further data processing with other tools (e.g. Excel).
- Bug fixes:
  - when batch deleting reservations with status *W – waiting (reservation)*, whose period of validity has expired – if several reservations from the same bibliographic record, for which there is also more than one reservation of unavailable material, were deleted, all copies of material, for which

reservations with status *W* were deleted, are from now on allocated to members from the list of reservations;

- when a different copy of available material from the same bibliographic record than the one that was reserved is loaned to a member, the reserved copy is deleted from the member's material record;
- when a member cancels a reservation of an available copy of a serial issue through COBISS+, the window with the list of reservations and reservation cancellations now also displays the issue number among the data on a cancelled reservation (*reservation cancellations* display) after the accession number;
- when returning a serial with status *B – retained* in the department with the method **Unavailable material / Return, delete**;
- when returning material with a long title;
- when displaying the loan period expiry date on self-checkout for serials.

#### V6.19-01, 9 October 2018

- At the request from the library, IZUM includes the parameter for displaying the member telephone number entered under the addresses of the member on the printout *Slip with reservation details*. In COBISS3, V6.19-00, this member telephone number was added to the printout *Slip with reservation details*. The telephone number has now been removed from the printout and will be only shown in libraries that request this.
- The type of address *Guarantor's/guardian's add. and perm. address* is shown on the signature pad if this is the only postal address for the member.
- Bug fixes:
  - when setting e-notifications on mobile devices, the setting of this type of e-notifications in the home library is now considered also for the push notification about outstanding debts;
  - from now on, when returning de-acquisitioned material with the **Unavailable material / Return, delete** method the message that the copy has been de-acquisitioned is displayed instead of the message that it has the loan status *available*;
  - when completing the reservation processing and when preparing the material for collection if there are multiple reservations of available material copies from the same bibliographic record and you assign an available material copy to the member that is different from the one that was reserved;
  - the link to the member that has the copy on loan is now visible in the links under the **Field 996/997**.

#### V6.19-00(1), 1 October 2018

- Bug fixes:
  - when loaning and reserving material from the same bibliographic record: if you want to loan the available material copy to a member, the message that this material copy is already reserved for another member is no longer displayed,

- and also the reservation of available material at the other member is no longer changed but the same material copy stays reserved;
- from now on, you need the privilege "*LOAN\_BASIC* – New members and change of member data, and loan related procedures" in order to prepare the registration form;
- you can prepare the membership agreement printout even if the library does not have a signature pad;
- the error in the RFID settings with the MvsFeigDevice driver is fixed.

#### V6.19-00, 29.–30. September 2018

- In the **Member** editor, the access to a member's note by clicking the **Note** button is moved to the bottom row in the **Member** window.

To see the longer notes better, the window for entering and changing the notes on the member is changed. From now on, the **Note** window is divided into the following parts:

- **All notes** window, where all the individual notes are displayed;
- under "System data" the username, department data as well as the time of entry or changing of the individual note;
- **Individual note** window, where the contents of the individual note is displayed or changed, or a new note can be added.

You can edit the notes with the following buttons (on the right):

- **Remove all** – delete all notes for the member;
- **Edit above** – select an individual note for overview or editing upwards;
- **New/Edit below** – select an individual note below or adding a new note;
- **Up** – move an individual note upwards;
- **Down** – move an individual note downwards;
- **Save** – saving the contents of an individual note;

By clicking the **OK** button, you save the contents of all notes and close the **Note** window, and by clicking the **Cancel** button, the changes are not saved. The length of a note about a member is no longer limited.

- The functionality of the use of the signature pad is updated. From now on, it includes two steps:

1. Display of member data on the signature pad

After you click the **Registration form** button in the **Member** editor, the **Signature pad** window will open. After you click the **Start** button, the following member data is displayed on the signature pad: name and surname, date of birth, gender, address, postcode and mobile phone number, e-mail (both from the e-notification data) and the member category. The member confirms or cancels the correctness of the data on the signature pad.

2. Signing the signature pad

After the member confirms the correctness of the data, the **Overview and sending of created report** window opens after you click the **Close** button in the **Signature pad** window. In the **Overview and sending of created report** window you can continue with the procedure of signing the registration form (activate the **Sign document** method on the **Registration form** display).

The listed member data is only displayed on the Signotec Omega signature pad.

- If you assign or loan a different copy of available material to the member than they have reserved, the procedure is performed as follows:
  - when processing the material reservation, when completing the processing of the reservation and when preparing the material for collection as well as
  - when loaning a different copy than the one that was reserved or prepared for collection (transfer from the status O or W to status C)

the reservation of the available copy of the material is deleted, and the member is assigned or loaned the copy of the material taken from the shelf.

The procedure is performed automatically for material copies from the same bibliographic record. The exception are serials and sets, where the procedure must still be performed by manually deleting the reservation of available material after loaning a different copy or set than the one that was reserved.

In the case of completing the processing of the reservation, preparing the material for collection and loaning a different copy of the material than the one that was reserved, a new transaction is entered: *49 – assigning another copy to the member*. The accession number of the copy that the member has reserved is entered into the transaction notes, which enables you a more detailed monitoring of the reserved material events.

- From now on, you can also view the status of the material on loan by using the class method **Field 996/997 / View**, where you need to enter the accession number of the copy.
- When selecting all material to be returned in the **Home library material** window a warning is displayed and the selection needs to be confirmed by clicking **OK**.
- Upon a request from the library, IZUM includes the parameters that enable the following:
  - that the **Entering/settling debts** window automatically closes after you confirm the debt is settled in the **Debts settlement** window and print the invoice;
  - that the members will be able to reserve unavailable material from the same COBISS.XX-ID in multiple departments via COBISS+ and mCOBISS.
- In libraries that use RFID devices and POS terminals we gradually started to setup the use of such devices on individual workstations and computers. The settings will be saved on the **System (C:)** drive to the **Cobiss3Files** directory in the file *RFIDTerminalParameters.txt* (for RFID devices) and *PosTerminalParameters.txt* (for POS devices).

After the installation of the COBISS3 software, V6.19, the settings, which were edited by IZUM until now, will be automatically edited and saved into the mentioned files the first time you use the methods that enable the use of RFID devices. You can edit and change them with the new method **Settings / RFID devices settings**. In the libraries where the use of RFID devices is not enabled in every department (there are 5 such libraries) this method is not visible.

If the user of the COBISS3 software does not have privileges for entering settings to the above-mentioned directory of the C: drive, a message about this will be displayed after each login to the COBISS3 system the first time they perform the method that enables the use of RFID devices. The operation and the use of the RFID

devices are nonetheless still enabled. However, for the message not to be displayed anymore, the software administrator will need to edit the settings. The settings file can also be copied to the local drive from another workstation.

Depending on the settings on the workstations, the option for scanning identification data of the material or of the member with the RFID device will be shown in methods that allow the use of RFID devices. If the RFID device does not work even though it is enabled on the workstation (e.g. it is not connected properly), a notification will be displayed. However, you will still be able to perform loan procedures.

- From now on, you can send the e-notifications that were not sent to the library members successfully at a later time from the workspace. Find the e-notification in the **Notification** class, load it to the workspace and activate the e-notification by clicking the **Send** button in the **Overview and sending of created report** window.
- From now on, it is also monitored, whether the e-mail was successfully sent from the mail server for e-notifications, when sending e-mails in the scope of e-notifications. If the e-mail is successfully sent, the event "E-mail message sent to" is entered in the events with the e-notification and the value of the notification status changes to "sent".

This option will be incrementally included in all libraries in the week after the installation of the COBISS3 software, V6.19-00.

- New definitions of loan transactions statistics are prepared, where the data is classified according to the physical form of the material. The classifications by the physical form of the material in the COBISS3 software replace the classifications according to the NBM table in the COBISS2 software.

Definitions of new statistics are in the folder **Reports / Standard / Loan / Statistics (user classifications) / Transactions**:

- *LOAN-STA-T54: By intended purpose/physical form/675s*
- *LOAN-STA-T55: By shelving UDC/physical form – motion picture 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*

For the needs of the mobile library a new statistic *LOAN-STA-T59: By mobile library stop/intended purpose/physical form/675s* is created alongside the classification of data by physical form. It is located in the folder **Reports / Standard / Loan / Statistics (user classifications) / Transactions / Mobile library**.

- A new report *LOAN-MM-08: Number of members of individual categories with entered material* is prepared, which shows the data on the number of members in individual categories that have entered material on loan with selected statuses at the time of preparing the report. Data preparation can be limited by statuses on loan, department, COBISS.XX-ID of the record and by some member characteristics (e.g. category) as well as by holdings data.
- In the loan transactions code list the transaction *23 – reading room transaction* is added to the groups *901 – transactions with material in the library* and *903 – transactions with material in the library, COBISS+ and mCOBISS*.

- The display of the subfield "996/9973 – Price (from invoice)" contents is included into the report *LOAN-EXP-01: List of uncollected debts*. This column shows the price and the discount rate in accordance with the COMARC/H format. The discount rate is informative and tells you what percentage of the discount is included in the price of the copy.
- In the report definition for calculating the number of active members (report definition groups **Loan / Statistics / Active members** and **Loan / Statistics (user classifications) / Members**) the transactions 35 – *member activity with equipment* and 51 – *online member registration* are also selected by default in the report parameter "Transaction".
- For material reservations of the mobile library department the information whether the material had been transferred to the mobile library is also shown under the call number on the report *Lending form for newly received reservations*.
- On the reports *Lending form for newly received reservations* and *Slip with reservation details* the data on mobile library stops is only displayed for material reservation in the mobile library department.
- On the report *Slip with reservation details* the member telephone number entered under addresses is shown, whether the user is subscribed to e-notifications or not.
- The report *Returned in another department* includes also ID and name of the department in which the material was returned.
- Bug fixes:
  - The default size of the **Entering and settling debts** window is reduced. You can adjust the size of the window to your own needs by placing the mouse at the edge of the window and dragging it accordingly.
  - A bug fix in the message that is displayed if you return the material on loan through interlibrary loan with the **Unavailable material / Return/delete** method.
  - Bug fix when assigning the spot on the list of reservations: from now on, after you loan the material waiting on a member to another member, the member on whom the material has been waiting for before the loan, is placed in the first spot on the list of reservations.
  - Self-checkout: bug fix when displaying data on reserved material on the lending form and when displaying the information about the fine when renewing a loan for material, whose loan period has expired.

#### V6.18-05, 22 August 2018

- When preparing the reference database of students, the structure of the text file used for the database is checked for correctness (see the *COBISS3/Loan* software manual, chapter [3.9.1 Structure of the file with data on students](#)). If the structure is incorrect, a notification is displayed informing you which line of the file contains the first error and about the type of the error. The procedure of preparing the reference database will be completed successfully once the structure of the text file is correct.
- When creating a reference database of students, the option for entering a note is removed.



- The option to delete the entry for one or more selected students is enabled in the reference database of students. You do this by searching the entry for one or more students in the reference database, loading them to the workspace and deleting them with the **Object / Delete** method.
- When performing the procedure of automatic member data entry, the structure of the text file used for the entry is checked for correctness. If the data structure is incorrect, a notification is displayed informing you which line of the file contains errors and about the type of error. The procedure of automatic member data entry is executed once the structure of the text file is correct.
- Bug fixes:
  - if the bibliographic record is inaccessible, the procedure for serial loan cannot be performed;
  - when entering the reservation cancellation via COBISS+ and mCOBISS;
  - the superfluous general part that sometimes caused the message not to be visible in its entirety is removed from the message displayed when returning material with restricted loan availability.

#### V6.18-04, 11 August 2018

- If the payment method *non-cash payment outside the library* is selected when settling debts, a message is displayed.
- Bug fixes:
  - in batch deletion of reservations with the status *W – waiting (reservation)*, the fee for the notification about received reserved material is not entered for a member, who is not subscribed to notifications about received reserved material;
  - it is impossible to reserve material indefinitely on loan in COBISS/OPAC if the local database contains no other copies that are available for loan;
  - when renewing a loan through self-checkout.

#### V6.18-03, 31 July 2018

- The age of a member with regards to the selected member category (*001 – pre-school children, 002 – primary school pupils or 003 – secondary school pupils*) is also checked when using the methods **Member / Home library material** and **Member / Enter visit**.
- The age of a member with regards to the selected member category (*001 – pre-school children, 002 – primary school pupils, 003 – secondary school pupils, 004 – full time students or 005 – part time students*) is checked before checking the membership validity.
- In transactions with equipment, the member's name and surname are not entered among the attributes. These two attributes were also removed from the search window and the display format for equipment transactions.
- When loaning is disabled due to outstanding debts, a member's visit can now be entered (method **Member / Enter visit**) if the conditions regarding the amount and duration of the debt have not been exceeded.
- Bug fixes:



- when creating a notification about a forthcoming overdue notice (2<sup>nd</sup>, 3<sup>rd</sup> and 4<sup>th</sup> overdue notice), the notification is not created if the loan period has not expired yet;
- when cancelling a debts settlement for a non-member, the "Payment method" and "Type of non-cash payment" are also entered upon the cash register transaction for the cancellation (transaction type 9);
- when entering debts for a non-member, the "Type on non-cash payment" attribute is no longer entered upon the cash register transaction (transaction type 1);
- the "Type of non-cash payment" attribute is not entered for the credit note;
- when displaying the home library name in reports *LOAN-MM-04: Notification about a loan period expiry date (mail)* and *LOAN-Mb-10: Notification about outstanding debts*;
- in sorting when returning through self-checkout.

#### V6.18-02, 11 July 2018

- In libraries that are subject to VAT the data on the turnover type for VAT and the data on the exemption clause is checked in the valid price list when entering the debts settlement. If either of the values is different from the value at the time of debt entry, the value from the currently valid price list is taken into account and not the value from the time of debt entry. **Both options are only available for debts entered in COBISS3/Loan.**
- The accession number on the report *Lending form for newly received reservations* is displayed in a larger font.
- The query parameters "Payment method" and "Type of non-cash payment" are added to the report *LOAN-CRO-03: Summary of list of invoices incl. VAT*.
- The option for displaying an extended set of bibliographic data is added for the purposes of displaying material data at self-checkout. The type of data is marked with a search prefix. This option is enabled by the NCC upon a library's request.
- Bug fixes:
  - in debts settlement for a non-member the superfluous note about the cash register drawer is removed;
  - on the report *Slip with reservation details* the information if the member was not notified about the reservation after library's decision is shown again;
  - on the report *Lending form for newly received reservations* a longer call number is not shortened;
  - on the report *LOAN-EXP-06: List of members' debts* a longer title is not divided into two parts (consequently into two lines);
  - in the notification about outstanding debts the amount of outstanding debts is written with two decimal numbers;
  - when preparing overdue notices in the XML format the address of the overdue notice recipient also includes the country if it is different from the home country;

#### V6.18-01(03), 3 July 2018

- Bug fix when entering the alternative number for the RFID membership card – the number must first be entered and saved, only then can it be used to perform other procedures (e.g. entering member data on the RFID membership card).

#### V6.18-01(02), 28 June 2018

- Bug fixes:
  - when entering member data on the RFID membership card;
  - when renewing loan at self-checkout.

#### V6.18-01, 23 June 2018

- The use of RFID membership cards is enabled. This option is enabled by the NCC upon a library's request.
- In libraries, where this option will be included, the **Scan RFID** button is added to the **Search by key** window (methods **Member / Search by key**, **Member / Home library material** and **Member / Enter visit**). This number enables the identification of the member with an RFID membership card.
- The RFID membership card number is entered and updated in the **Member** editor, under the **Alternative ident. numbers** tab. First, you need to enter and save the RFID membership card number. After the card number is entered, you can click the **Edit** button to perform the following procedures:
  - by clicking the **Scan RFID** button you can scan the RFID membership card number,
  - by clicking the **Enter RFID** button you enter the member data on the RFID membership card,
  - by clicking the **Update RFID** button you update the member data on the RFID membership card,
  - by clicking the **Print RFID** button you print the member data on the RFID membership card.

#### V6.18-00(03), 14 June 2018

- Bug fixes:
  - when entering a new postal address of a member in the **Postal address** editor, the default address type defined for the library will be taken; if a default postal address is already entered for the member, the address type is not taken and must be defined manually; the bug fix refers to libraries with activated control of conformity of the address with the Register of the Surveying and Mapping Authority of the Republic of Slovenia;
  - when controlling the entry of two identical address types of the same member;
  - when controlling the entry of price list items, the setting of the liability to VAT payment of the highest superior partner is taken into consideration;
  - when settling debts partially.

#### V6.18-00(02), 11 June 2018

- Bug fixes:

- when changing due date and defining that the copy is lost for the material that is the first in the list of recorded material in the **Home library material** window;
- when performing the job that makes it possible to daily refresh member details for accessing information resources;
- in relation to the visibility of the attribute "Online registration" in the search window and in the **Member** editor;
- in the report *LOAN-CRO-02 List of invoices incl. VAT*, where the turnover type for VAT return appears in the column *VAT rate*.

#### V6.18-00(01), 11 June 2018

- Bug fixes:
  - when using the **Unavailable material / Return, delete** method for material return in library internal work departments (e.g. textbook fund departments).

#### V6.18-00, 9–10 June 2018

- It is possible to sort turnover into types when calculating VAT (e.g. *non-taxable transaction, exempt from VAT, 22% and 9.5%*). For this purpose, a new **Turnover type for VAT return** attribute has been enabled, which will replace the **Tax rate** attribute.
- If a library is not identified for VAT purpose (the box for the **Identif. for VAT purpose** attribute in the home library details or the superior partner details is not checked), it is only possible to select the *Exempt from VAT* turnover type. Libraries that are registered for VAT can select any value.
- Also changed are the reports related to cash registers, in which the turnover data is displayed according to the **Turnover type for VAT return** attribute value:
  - *Invoice*
  - *Cancellation of invoice*
  - *Credit note*
  - *REPORT INVOICES HEADERS.TXT*
  - *REPORT INVOICES ITEMS.TXT*
  - *Price list*
  - *LOAN-CRO-32 List of invoices*
  - *LOAN-CRO-01 List of invoices*
  - *LOAN-CRO-02 List of invoices incl. VAT*
  - *LOAN-CRO-03 Summary of list of invoices incl. VAT*
- In libraries, which are using RFID devices, the following options have been added and updated:
  - All procedures, which enable scanning of material on the RFID device by clicking the **Scan RFID** button, can now be activated by pressing the **F8** key.
  - In cases, where protection is not removed or set when loaning or returning material using the RFID device and a message is displayed in the **Error when protecting material** window or the **Error when removing protection from material** window informing you of that, a new **Protection status** button is displayed to the left of the **OK** button in both windows. Clicking the button activates the method **System / RFID device/protection status**, which opens the

- RFID control panel** window, where you can check and, if necessary, edit the material protection status.
- Enumeration of copies scanned with the method **System / RFID device/protection status** now starts with the number 1 (previously 0).
  - The error that occurred when displaying the information on which set items are missing when scanning any of the set items with the **Search** method in the **Field 996/997** class has been corrected.
  - When manually entering debts, it is from now on only possible to change the values of the following attributes: "Details", "Number of units" and "Note".
  - The message that is displayed when a member, who is a student older than 26, visits the library, will from now on only be displayed in those libraries, which will send a request to the NCC and ask for the control to be enabled.
  - In the **Member** editor, the **Members group** attribute has been added to the **Membership** tab, which enables you to place a member into a selected group (e.g. for the purposes of accessing information resources (alumni, exchange students) and for the purposes of creating various members lists). First, the members groups must be entered to the local code list **Members group (CODE 328)**.
  - In the browser toolbar, you can add a button for quick access to the class method **Cash register balance / Open the cash register drawer** by using the **Setting the toolbar** option (right click the mouse in the toolbar).
  - The cash register drawer now opens when you click the **Settle debts** button in the **Entering and settling debts** window and no longer at the end of the debt settlement when the invoice is printed.
  - When returning de-accessioned material not entered for the member, a message appears that the material is de-accessioned.
  - The call number on the *Lending form for newly received reservations* report is displayed in a larger font size.
  - On the notification about a forthcoming overdue notice, which is sent by e-mail, the department where the material was put on loan has been added.
  - Bug fixes:
    - when entering the return of material on interdepartmental loan in the host department using the method **Unavailable material / Return, delete**;
    - for a member, who has not signed the registration form, the appropriate message is displayed again before switching to the **Home library material** window;
    - when taking into account loan restrictions due to outstanding debts if the debt arose from the returning of material, whose loan period has expired;
    - when entering debts for a non-member, a cash register transaction is recorded.

#### V6.17-02, 31 May 2018

- An option, which enables the wholeness of a set to be checked with an RFID device and not in COBISS3/Loan, has been added. This option is enabled by the NCC upon a library's request and can only be enabled in libraries with RFID devices, with which it is possible to check the wholeness of a set.

When a user in a library with this option enabled logs into COBISS3, the **RFID set** button appears in the **Set** window upon the first transaction with the set. Clicking this button transfers the set wholeness control to the RFID device. Then, the RFID device scanning process is repeated. When performing all further procedures with sets, all set items on the RFID device are scanned after you click the **Scan RFID** button, whereas only the leading set item, which is all that is needed to perform the selected procedure for all set items, is transferred to COBISS3/Loan. When the user logs out of COBISS3, the control is deactivated. Therefore, the switch must be performed after each COBISS3 login when the user first encounters working with a set.

- Bug fixes:
  - when performing self-checkout procedures in libraries with departments;
  - when entering non-cash payments in libraries with the enabled option of opening the cash register drawer after the debt settlement.

#### V6.17-01, 22 May 2018

- It is possible to cancel a debt settlement for a non-member. First, find the invoice in the **Invoice** class and transfer it to the workspace. Then, use the **Object / Cancel** method. Cancel the invoice by clicking the **Cancel** button.
- On the report *LOAN-R-05: Reservations of available material – by status*, the volume (subfield 997j) and the year (subfield 997k) of the serial are also displayed for reservations of serials in the "accession no." column.
- The button highlighted by default for the method **Unavailable material / Return, delete** is no longer **Scan RFID** but **OK**. Scanning material with the RFID device is activated by clicking the **Scan RFID** button or pressing the **F8** key.
- Bug fixes:
  - when entering a non-cash debt settlement outside a library when the member only settles a part of the debt;
  - when sorting material that was returned through self-checkout and whose \u element in the call number contains a space;
  - when returning a set with the method **Unavailable material / Return, delete** to a department different from the one it was loaned from;
  - when displaying street and number in a member's address in the report *LOAN-Mb-10: Notification about outstanding debts*;
  - on the report *LOAN-ON-01: Overdue notices* for multi-layer carbon-copy envelopes, the display of the current number (e.g. 1/1, 1/2, etc.) is moved to the upper edge of the three layer carbon-copy envelope because of automatic scanning of the overdue notice recipient's address.

#### V6.17-00(03), 12–13 May 2018

- Bug fixes:
  - when displaying the sublocation on the lending form for newly received reservations, if the copy is relocated to another sublocation – the lending form

now displays the data on the sublocation of the relocation; this bug fix was only necessary for libraries with the enabled parameter for specifying the display of call number elements in the catalogue and for unavailable material;

- when returning serials using the quick return method **Unavailable material / Return, delete**;
- when batch deleting reservations of serials (in case of any further reservations, these are no longer deleted);
- in methods **End processing** and **To shelf (W)** when processing reservations of serials in case of bound volumes;
- the **Edit** method has been disabled for invoice and credit note items;
- the SMS and push notifications about outstanding debts now also display the notification text alongside the data;
- in the contents of the notification that is displayed after performing the **End processing** method when processing reservations of available material if you enter or scan an incorrect identification number of the copy;
- when deleting the "Outside loan not permitted" restriction when returning material from the last overdue notice, an automatic check is performed to see if the last overdue notice exists in other departments;
- in the date of a debt that was entered in the COBISS2/Loan software module in the following reports: *LOAN-Mb-08: List of members with debts*, *LOAN-Mb-10: Notification about outstanding debts*, *LOAN-Mb-11: List of members' debts* and *LOAN-EXP-06: List of members' debts*.

#### V6.17-00(01), 24 April 2018

- Bug fixes:
  - when returning a set to a department different from the one it was loaned from, the fine is calculated only once for the set as a whole;
  - the expiry date of status *L – lost* for sets can also be entered manually;
  - when taking into account reservation restrictions through COBISS+ for serials;
  - the leading zero is removed when scanning the CUID from an Urbana card (applies to Ljubljana City Library, which uses the Urbana card).

#### V6.17-00, 21–22 April 2018

- When returning a set to a department different from the one it was loaned from, the slip printed at that time includes the accession numbers of all set items (only the leading items of the set up until now).
- The slip with selected copy details that can be printed from the loan catalogue is extended by 3 lines.
- The slip with reservation details is updated with the mobile library stop. The details are displayed if the material was reserved by a member registered at the mobile library.
- Updated reports:
  - in the report *LOAN-Mb-08: List of members with debts*, the member details also include the data "Class/grade" and "Superior member/partner";

- in the report *LOAN-Mt-01: Material by transaction*, a new input parameter "Library department" is added; call number is added to the list under material data.
- Bug fixes:
  - after moving notes for a member, the data on the username and on the time of entry remain unchanged;
  - using the method **Unavailable material / Return, delete**, it is also possible to return material by entering the loan number;
  - the **Show** method is removed from the **Invoice** object;
  - when calculating fines for loan renewals with devices that use SIP2;
  - when deleting reservations with the method **Unavailable material / Delete expired reservations**, the list of deleted reservations is created again.

#### V6.16-03, 16 April 2018

- In libraries using the RFID devices, the following options are added and updated:
  - After activating the method for scanning copies with the RFID device, the data on the number of accession numbers scanned with the RFID device is displayed to the right of the **Scan RFID** button in the **Home library material** window. The number is displayed in bold and red, and remains displayed until the next scan of copies with the RFID device (until you click the **Scan RFID** button again).
  - When returning material to a different department from the one where it was put on loan, the return of material is performed for all copies scanned with the RFID device. A return slip is printed for each returned copy. For a set, only one slip is printed.  
**NOTE:** Returning an incomplete set to a different department from the one where it was put on loan is not possible!
  - If the option for entering/scanning accession numbers is selected when processing reservations of available material (method **Monitoring and processing reservations of available material**) with the methods **End processing** and **To shelf**, the procedures are performed for all copies scanned with the RFID device.
  - If set items are put on the RFID device, the selected procedure is automatically performed for the whole set, but only if all items from the set were scanned with the RFID device. If this was not the case, the **Set** window will open, where you can enter accession numbers of the unscanned set items or repeat the procedure of scanning copies with the RFID device. For this purpose, the **Scan RFID** button has been added to the **Set** window.  
**TIP:** When returning damaged set items, do not put them on the RFID device. Damaged set items must be marked manually and assigned the appropriate status.
  - When searching by key in classes **Field 996/997** and **Unavailable material**, the **Scan RFID** button is highlighted by default.
  - For methods **Unavailable material / Return, delete** and **Field 996/997 / Enter transaction with material in reading room**, the **Scan RFID** button is highlighted by default.



- If more than one copy is put on the RFID device, the method for searching by key in the **Field 996/997** is performed for all copies on the device, and all scanned objects in this class are transferred to the work surface.
- In the **Home library material** window, the data on the number of copies on loan is displayed in bold and red.
- Bug fixes:
  - when returning material to a different department from the one where it was put on loan, the slip with the material data is printed separately for each returned copy or set;
  - after the transition from COBISS2/Loan to COBISS3/Loan, the recorded material in the **Home library department** is sorted by date of loan in ascending order;
  - when cancelling reservations of material with devices using SIP2.

#### V6.16-02(01), 5 April 2018

- Bug fixes:
  - the address of the overdue notice recipient on A4 format is displayed 1 cm lower;
  - when performing batch deletion of expired reservations with the status *O – reserved available copy* for material with additional reservations, the status of the copy on loan changes from *R – reserved unavailable material* to *O – reserved available copy* for the first member on the list of reservations.

#### V6.16-02, 31 March 2018

- On the *Lending form for newly received reservations* report, the volume (subfield 997j) and year (subfield 997k) of a serial are also displayed when reserving serials.
- It is no longer possible to enter a permanent note for material with status *R – reserved unavailable material*.
- When settling debts for a non-member with cash payment, the potential amount to be returned is displayed in a new window.
- Bug fixes:
  - when specifying the expiry date of status *L – lost* for a set with material, whose return date has not expired yet, the time parameter from the *res* column is taken into account;
  - when reserving serial issues that are on loan – through COBISS/OPAC, it is also possible to reserve issues that are on loan;
  - for material with status *B – retained*, the information on the current fine is no longer displayed in My library, since the fee for material with this status is not calculated;
  - displaying a foreign country in the address of the overdue notice recipient is no longer tied to address type; if the country is different than the country of the home library, it is always displayed in the address of the overdue notice recipient;
  - when returning reserved material, the content of the temporary note, entered for material with status *R – reserved unavailable material*, is transferred to the item of material that receives status *W – waiting (reservation)* when returned;

- when taking into account the individually set restriction on the number of copies on outside loan – this restriction has precedence over the general restriction;
- when returning interdepartmentally retained material with the method **Unavailable material / Return, delete** for material that was put on loan in the mobile library and returned in a different department.

#### V6.16-01(01), 19 March 2018

- The option for cutting the last character when reading the 8-digit card number is added; the parameter is enabled upon a library's request.

#### V6.16-01, 15 March 2018

- For performing the method **Invoice / Set invoice No.** the *CRO\_PL* privilege for price list management is now required (until now it was the *CRO\_CCR* privilege).
- For setting the membership card number counter, the *LOAN\_EDT* privilege for changing loan parameters is now required (until now it was the *LOAN\_OPER* privilege).
- When entering debts settlement, you are now also allowed to select the *00 – no data* type of non-cash payment when selecting non-cash payment.
- Bug fixes:
  - when performing interdepartmental loan, the data on the material type is also recorded in the loan transaction file;
  - when sending a large quantity of general notifications to members.

#### V6.16-00, 10–11 March 2018

- In order to prevent unwanted deletion of debts, you are required to additionally confirm the deletion of selected debts after clicking **Delete debts** in the **Entering and settling debts** window.
- In the **Home library material** window, the cursor remains in the window for entering the accession number (under IN/CN=) when changing the loan type (**Outside loan / Reading room loan**).
- The reports *LOAN-CRO-02: List of invoices incl. VAT* and *LOAN-CRO-03: Summary of list of invoices incl. VAT* are updated with the overview of payments by individual service types.
- In report definitions for calculating the number of visits, the transaction *29 – visit by non-member* is also marked by default under the "Transaction" report parameter.
- Bug fixes:
  - If upon the return of an item of borrowed material to the reading room, the person in charge of the loan cancels the allocation of the material for further use in the reading room for the selected member, a check is also performed to see if the material is reserved for another member.

- If loan renewal is not possible when you are renewing a loan by selecting all recorded material for a member, the selected items are unmarked when you return to the **Home library material** window.
- The LOAN\_OVR privilege is no longer required for performing the method **Member / Overdue notices – overview**.
- When entering, changing or deleting a note for a member, the date of the last visit is not updated.
- If in the time parameters table, the reservation validity period is not specified for a specific type of material, which can otherwise be put on loan, that material cannot be reserved.
- In the report *Lending form (today's or selected material)*, the leading zero is also displayed in the total amount of outstanding debts below 1.
- Temporary note for material, which is reserved for a department, is kept if the material is put on interdepartmental loan.
- In My library, the current fine is not displayed for members, who are exempt from fines.

#### V6.15-02, 22 February 2018

- Bug fixes:
  - from now on, if the library has the value "1 – with outstanding debts" selected on the forms for lending forms and invoices, the report *Lending form (today's or selected material)* includes only the total amount of outstanding debts;
  - when preparing overdue notices in XML format.

#### V6.15-01, 19–20 February 2018

- A new statistical report *LOAN-STA-T53: By type of material (books and brochures, serials, integrating resources, other)* is created to prepare data intended for the questionnaire concerning the work of libraries. In the displayed report, the details about the number of transactions appear by the following types of material: books and brochures, serials (regardless of the physical form of the serial), integrating resources and other material.
- A membership card label can be printed also for the membership card number that is entered among the member's alternative numbers. To enable this option, libraries must send a request to NCC.
- Bug fixes:
  - when the department ID appears on slips and lists containing the details about reservations of material.

#### V6.15-00(01), 12 February 2018

- Bug fixes:
  - after using the **Member / Home library material** method, the member is loaded to the workspace.

#### V6.15-00, 10–11 February 2018

- In the browser toolbar, you can add a button for quick access to the class method **Invoice / Enter debts settlement for non-member** by using the **Setting the toolbar** option (right click the mouse in the toolbar).
- In the **Member** editor, the **Superior member** attribute has been moved to the front part of the editor, behind the **Membership card number** attribute.
- In the **Member** editor, the **Superior member** tab is added, which enables searching for subordinate members, i.e. members, who visit the library on behalf of a legal entity or a holder of a family membership card. You can search for superior members by partner symbol and name (partner name can be shortened with the character \*). You can search for members with a family membership card by name and surname of the holder of the family membership card. Search results only display subordinate members.
- In the list of attributes, which are displayed in the browser after selecting a member, the value of the attributes **Gender** and **Membership validity** is now also displayed. This means that these attributes are now also available in the *Data export software* in the **Member** class.
- When deleting member details, it is no longer possible to select whether the membership card number should be made available or remain unavailable. The number of a deleted member's membership card always remains unavailable and cannot be given to another member.
- Identification of a member with a membership card number, which is no longer valid because the membership card number for the member was changed or because the member was deleted from the database, is not possible.
- When a member belonging to category *004 – full time students* or *005 – part time students* visits the library, their age is checked. If the member is older than 26, a message is displayed when you enter or exit the **Member** editor, open the **Home library material** window, or enter the visit by a member using the **Member / Enter visit** method.
- When checking members for duplicates, the address of the member, who is a potential duplicate, is also displayed alongside their name and surname.
- Upon a library's request, it is possible to increase the character limit for an individual member note with the use of a special parameter (by default, individual notes are limited to 90 characters).
- Updated contents of the lending form and invoice:
  - on the list of outstanding debts, the outstanding debts are displayed collectively by service/debt type and price class (e.g. all entered fines for books are collectively displayed in a single row);
  - if a member has outstanding debts in several departments of a library with departments, the debts are displayed by individual library departments on the list of outstanding debts;
  - in libraries with departments, the current fine is displayed separately for each individual library department;
  - if a member has no recorded material, the text "No recorded material" will be displayed on the lending form in the section List of material.

- It is possible to include alternative numbers to the list of details, which are displayed for a member on lending forms and invoices. For this purpose, a new changeable value *alternative number* is added to the data editor for lending forms and invoices (method **Home library / Create lending forms and invoices**). If there are several alternative numbers entered for a member, all of them are displayed and separated by spaces.
- When manually entering membership fees (which is usually done automatically), you can also renew membership validity.
- When entering debts settlements, the type of non-cash payment must be selected when selecting non-cash payment.
- In the **Entering/settling debts / Transactions** class browser, the search field "Membership card number" is added.
- In libraries with departments, you can use a special parameter to specify that the restriction for the number of copies on outside loan, which is defined in the restrictions on operations or for an individual member, applies to the whole library and not just to one department, which is the default setting. The parameter is enabled on library's request.
- In the case of a quick return of a set item (method **Unavailable material / Return, delete**), the item, whose identification number you have read, is already marked for return in the window for returning the set.
- When loaning or renewing the loan of material, for which the loan/loan renewal period is entered in the subfield 996/997u, the message is no longer displayed in a new window but in the status bar in the lower part of the browser. You will be alerted of this message by a message on the desktop. You can view the messages by clicking the **Messages** button in the status bar, or by using the method **System / Messages / View messages**.
- In the catalogue, you can mark a copy of the material and then hold down the **Shift** key and press **View** to print out a slip, on which the title, author, call number and accession number for the selected copy are displayed. The slip is printed with the printer for printing lending forms.
- The search limit for material in the loan catalogue is increased to 2000 copies of the material.
- In the **Home library material** window of a library department, the **Lending form** button is now active, which enables you to print out the list of material, recorded in the host department, on A4 format. By default, the list is sent to the printer specified by the logical destination *Printer – Loan*.
- When batch deleting inactive members, a separate list of members is created. This is a list of members, who will not be deleted because of an entered note, but who have no other debts with the library.
- For the purposes of sorting data in statistical reports for loans by municipality of the mobile library stop, the municipality of the mobile library stop must be added in brackets to the *Mobile library stop (CODE 311)* code list.
  - Example: *02 Brezje (Maribor)*, where *02* is the code, *Brezje* the name and *Maribor* the municipality of the mobile library stop.

- New statistical reports, in which the sorting of data by municipality of the mobile library stop will be enabled, will be prepared gradually; for now, the new statistical report *LOAN-STA-Mb11: By municipality of mobile library stop/mobile library stop (at the member)/member category* is added.
- If the default login department in the *Departments (CODE 301)* code list does not exist anymore for any of the usernames in a library with departments, the user will log into the department, listed first on this code list, when logging into COBISS3.
- If the mobile library department is set as the default login department for a username, the user will log into the mobile library stop, which is listed first in the *Mobile library stop (CODE 311)* local code list, when logging into COBISS3.
- New reports:
  - Report *LOAN-EXP-05: Material in mobile library* enables you to create a list of material in the mobile library. The report is added to the **Data for further processing** subfolder, and is an alternative to the statistical report *LOAN-Mt-03: Material in mobile library*.
  - Report *LOAN-Mt-06: Loan of serials* enables you to create a list of loaned serials in the selected period. For each serial, the data on the number of loans, loan renewals and reservations is displayed. The report also includes a separate form *LOAN-Mt-06: Loan of serials (for further processing)*. It is added to the **Lists / Material** subfolder and prepared in a way, which enables you to save it as an Excel worksheet, where you can continue processing the data, provided you have the right version of Adobe Acrobat.
  - Reports *LOAN-Mb-11: List of members' debts* in the **Lists / Members** subfolder and *LOAN-EXP-06: List of members' debts* in the **Data for further processing** subfolder are an alternative to the report *I-C-08: List of members with debts*. They enable you to create a list of all outstanding members' debts in the selected period.  
 In the report *LOAN-EXP-06*, the data is prepared in a text file and separated with the character "|". When the file with the data is ready, click the **Save as** button and save it to the appropriate location in the **Overview and sending of created report** window. For further processing, you can import the data into other software (e.g. Excel). At the end of the list, the current fine for members is displayed. After importing the data into an Excel file, sort it by membership card number.
  - Statistical report *LOAN-STA-C11: By municipality of mobile library stop/mobile library stop (at the member)/member category* is intended to be used to prepare data on the number of active members, sorted by municipality of the mobile library stop, mobile library stop and member category. The report is in the group of reports **Loan / Statistics (user classifications) / Members**. Before you create the report, you must update the local code list of mobile library stops by adding the name of the municipality in brackets to the name of the stop, e.g. *Brezje (Maribor)*.  
 Dynamic sorting by municipality of the mobile library stop and by mobile library stop is included in the definition of this statistical report. If the default sorting type is not appropriate, prepare the user sorting definitions (e.g. for sorting by



municipality of the mobile library stop, enter the municipalities, covered by the mobile library, to the *municipality of mobile library stop\_1* (static classification).

- Updated reports:
  - in the report *LOAN-MM-07: List of reserved material*, data on the department of the reservation has been added to the data on members with reserved material;
  - in reports from the subfolder **Lists / Members**, the column with the number is widened;
  - in reports *LOAN-Mb-02: Members by date of last visit* and *LOAN-Mb-06: Members by date of last visit/by departments*, the data on members is sorted by date of the last visit; if you selected several library departments when creating the report *LOAN-Mb-06: Members by date of last visit/by departments*, the data on members is displayed separately for each department (each department on a new page);
  - in the report *LOAN-Mt-03: Material in mobile library*, the author and the title are now displayed in separate columns; the column order is also changed (No., Accession No., Call No., Author, Title and Year);
  - when creating the report *LOAN-TR-04: List of cash register transactions*, the input parameter "Membership card number" is added, which means that you can now also create this report for a selected member;
  - the overview of total amounts by individual type of non-cash payment is added to the reports, related to cash register transactions, where data on non-cash payments is included: *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*;
  - in the definitions of statistical reports for calculating the number of visits, the following transactions are selected by default for the report parameter "Transaction": *member registration, 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, change of due date, start of routing, visit by member (internet access), reading room reservation, end of routing, payment entry, visit by member (reading room), interlibrary loan, interlibrary return, change of number, visit by member – miscellaneous, member activity with equipment*;
  - because of the length of descriptions of the classification definitions, the statistical reports *LOAN-STA-T12*, *LOAN-STA-T19*, *LOAN-STA-T35*, *LOAN-STA-T36*, *LOAN-STA-T37*, *LOAN-STA-T38*, *LOAN-STA-T39*, *LOAN-STA-T40*, *LOAN-STA-T44*, and *LOAN-STA-T49* are prepared to be printed in A4 landscape format;
  - statistical reports of transactions, which are created for the purposes of the mobile library, are moved to the subfolder **Statistics (user classifications) / Transactions / Mobile library**.
- Bug fixes:



- in loaning a set of items using the RFID device if not all of the set items are put on the device and if there is other material on the device as well; when you cancel the loan of an incomplete set, the remaining material is loaned, which is immediately visible in the **Home library material** window;
- in checking the age of members for categories *001 – pre-school children*, *002 – primary school pupils* and *003 – secondary school pupils* (applicable to Ljubljana City Library, which uses Urbana);
- in checking the membership validity when reserving material through My library, if the material is from a department, where the membership fee is not charged and the member's membership has expired;
- in checking for duplicates when registering a new member, if date of birth is not required information for all member categories.

#### V6.14-02, 20–21 January 2018

- For the needs of academic and university libraries, a new report has been added to the **Loan / Statistics / Active members** group of reports, namely *LOAN-STA-A07: By university/member category/university in eVŠ (after the year of transition to COBISS3/Loan)*. It is intended to be used when preparing data on the number of active members in the year, in which a library made the transition to the COBISS3/Loan software module. The data is sorted by university, member category and university in eVŠ. When creating the report, it is possible to select the members you want to include in the creation of the report using the input parameters "Category", "University" and "University in eVŠ".
- Bug fixes:
  - in cases, when availability level is set for serials, for which the library allows a restricted outside loan, but it does not allow reserving copies with restrictions through COBISS+, these serial issues cannot be reserved through COBISS+;
  - in recording SMS notification status and events;
  - in returning serial issues, which are reserved for reading room use;
  - when sending a notification on reserving available material to the email entered in the reservation processing spot; from now on, this notification is only sent when reserving available material in COBISS+ and not when a librarian performs the reservation; the form of the notification is also edited.

#### V6.14-01(03), 13–14 January 2018

- Bug fixes:
  - in calculating the expiry date in cases, where 1 and 2 January are included in the calculation;
  - in printing the lending form in self-checkout and in displaying the data on the screen in self-checkout in the case of loan renewal and insight into the recorded material status;
  - in overdue notices in A4 format, the signatory title and the signature image are merged on one page;

- in calculating the number of active members (statistical reports from *LOAN-STA-A01* to *LOAN-STA-A04* and from *LOAN-STA-C01* to *LOAN-STA-C10*), the partners for interlibrary loan and library departments are not taken into account as members.

#### V6.14-01(02), 6–7 January 2018

- In statistical reports, where classification based on the type of transactions in loan is included, the numeric identifier of the transaction is displayed along with the description of the transaction.
- Bug fix regarding the conditions for remote access of members for the needs of the National and University Library (NUK).

#### V6.14-01(01), 22 December 2017

- Bug fix regarding the saving of the 2018 calendar.

#### V6.14-01, 21 December 2017

- In libraries with a shared database of members, the record on the member is transferred to the local database of members of the selected library when logging into My library service through COBISS+.
- Bug fixes:
  - in displaying the warning about an unsuccessful interdepartmental loan of material, which is transferred to the mobile library;
  - in returning serial issues;
  - in using the shortcut for printing lending forms by pressing the **Alt** and **D** keys in the **Home library material** window;
  - in preparing a special lending form for newly received reservations in the A5 format for a selected copy in the **Home library material** window by holding down the **Shift** key and clicking the **Delivery note** button (update for the work needs of the NUK library);
  - in checking the signature of the registration form when switching to the **Member** editor using the object method;
  - in renewing a loan through self-checkout and automated phone service, same rules for renewing apply as in the COBISS3/Loan software module and through My library;
  - in preparing a list of members with the data for e-notification, when member details are entered in Cyrillic or in the Cyrillic interface;
  - pri izpisu statusa RFID-naprave in statusa zaščite gradiva v knjižnicah z oddelki
  - in creating statistical reports for active members (reports from *LOAN-STA-A01* to *LOAN-STA-A04* and from *LOAN-STA-C01* to *LOAN-STA-C10*) in respect to considering the activity of non-members and the transactions, which are not linked to a specific member;
  - in creating statistical reports for the loan of material (reports from *LOAN-STA-Mt01* to *LOAN-STA-Mt12*) in respect to displaying the classification categories
    - all categories are displayed, even if there are no transactions;

- in creating statistical reports (reports from *LOAN-STA-T01* to *LOAN-STA-T03*) in respect to displaying the classification categories – all categories for the included transactions are displayed; the special table for displaying transactions of non-members is removed; the data on transactions, which are not linked to a member, is included in the category "empty value";
- in creating statistical reports for visits (from *LOAN-STA-VT01* to *LOAN-STA-VT07*) in respect to displaying the classification categories – all categories for included transactions are displayed;
- in creating the statistical report *LOAN-Mb-08: List of members with debts*, the current fine is not displayed for members, who are exempt from fines;

#### V6.14-00(02), 13 December 2017

- Bug fix:
  - if a library has the option enabled, which allows for considering the availability level when renewing a loan, the new due date will be displayed after renewal;

#### V6.14-00, 9–10 December 2017

- A new function called **Equipment loan** is included and it enables you to enter equipment data (e.g. e-readers that the library loans to its members) and to enter procedures for equipment loan.  
Please contact the NCC for the setting of the length of the accession number.
- An updated method of monitoring and processing material reservations is included.  
This function will be included into libraries in 2018.
- The option for preparing data about the settings of e-notifications that are activated for members is added. When preparing the data, the members that have an e-mail or a mobile phone number entered in the data for e-notification are taken into account. You can prepare the data in the object **Electronic notification** with the method **List of members with data for e-notifications**. During the preparation process you need to specify the location and the name of the file (file type must be *.txt*, e.g. *notification.txt*), where you will save the data. When the process is complete, a message will appear. The file contains the following data on members: membership card number, name, surname, e-mail and mobile phone number. For all possible types of e-notifications you will also see whether the member is subscribed to the notifications (value "Yes") or not (value "No"). The data is separated with the "|" character. Import it into MS Excel software, where you can edit it at will (e.g. sort them according to whether the member has an entered e-mail or not).
- In the library (department) calendar you can enter the reason why the library or its department is closed for the days that it is closed. First highlight the day when the library (department) is closed on the calendar and then enter the reason under the **Note:** option. After you confirm the day that the library is closed, the entered note is recorded for this day by clicking the **Define** or **Define all** button. You can see it in the screen tip when you are located at the specific day on the calendar. The note is deleted if you specify that the library is opened for the selected day.

- In the catalogue, the number of records corresponding to the search request is also shown in the search results next to the number of fields 996/997.
- In the libraries that use the control for renewing the loan only for material with a specific status when renewing loan with the **Renew all** option the same control will be taken into account also in changing the due date with manual entry of the date or validity period.
- The report *Lending form for newly received reservations* is updated with the report of the mobile library stop that is entered for the member.
- In the **Home library material** window the option for printing the lending form for newly received reservations for the selected entered copy. You can print it by holding down the **Alt** key and clicking the **Lending form** button. The lending form is in the A5 format. The update is being implemented for the work needs in the NUK library.
- A new subfolder *Data for further processing* is added in the reports for loan purposes with two new reports:
  - *LOAN-EXP-03: Material by transaction* that enables you to create a list of material with selected transactions for a selected period. This report is an alternative to the report *LOAN-Mt-01: Material by transaction*.
  - *LOAN-EXP-04: Members with entered material* that enables you to create a list of entered material for selected members. This report is an alternative to the report *LOAN-MM-01: Members with entered material*.

The data is created in a text file and is separated with the "|" character. When the data file is created, you save it to the appropriate location by clicking the **Save as** button in the **Overview and sending of created report** window. You can import the data into other software tools for further processing (e.g. MS Excel).

- Two new reports for loan purposes are added:
  - *LOAN-Mb-10: Notification about outstanding debts* that enables you to notify members about outstanding debts via regular mail or via e-mail. When creating the report you specify the start and end date of the period, for which the entered debts will be taken into account. The members that have an entered e-mail for e-notifications will receive the notification to their e-mail, and for other members a report will be created and sent via regular mail. The contents of the introductory text of the notification can be adapted to the needs of the library in the variable *Introductory text (LOAN-Mb-10)* (folder *Variables/Standard/Loan/Notifications sent from reports*).
  - *LOAN-Mt-05: Material statistics in mobile library* that enables you to view the current status of the material in the mobile library.
- Reports for loan purposes are updated:
  - *LOAN-Mb-08: List of members with debts*: the information about current fine in the department selected when creating the report is added (applicable to libraries with departments).
  - Query parameters "Author", "Title" and "COBISS.XX-ID" are added when creating the report *LOAN-MM-07: List of reserved material*.

- Query parameters "Bibliographic level (001c)", "UDC for statistics (675s)" and "Intended purpose (100e)" are added when creating the report *LOAN-Mt-02: List of most requested material*.
- In the COBISS3/Reports software module the statistics subgroup *Visit* (reports from *LOAN-STA-V01* to *LOAN-STA-V07*) is removed from the reports for loan purposes (**Reports / Standard / Loan**). These statistics are replaced by statistics from *LOAN-STA-VT01* to *LOAN-STA-VT07* and visit statistics in the **Statistics (user definitions) / Visits** subfolder. These statistics use the method of calculating visits that enables libraries to be more flexible when acquiring data about the number of visits (e.g. the library can independently decide which member activities they want to include in the calculation of physical library visits).
- Bug fixes:
  - when entering the return of the last copy with entered overdue notice (method **Unavailable material / Return, delete**) the selected material is written off for the customer after you confirm the return (**Return** button);
  - the data on material from a set are written together on the lending form;
  - in searching for members with a family membership card;
  - in the **Notification** search window at the expand option after the notification status when the notification has the status "created";
  - when you enter a debt settlement for a non-member, the transaction 32 – *payment entry* is entered;
  - when you delete an alternative number, it is not added to invalid numbers but permanently deleted;
  - in calculating the number of visits in the visit statistics:
    - if the same type of transactions were entered for a member in the same department in the period taken into account when calculating visits;
    - if the same transaction was entered for the member within one hour in different departments;
    - each transaction 29 – *visit by non-member* is now entered as a new visit.

#### V6.13-03(05), 22 November 2017

- Bug fixes:
  - when identifying a member with the alternative number "membership card number", the member is not entered into the local database of members if there is an entry in the reference student database but not in the local database;
  - when paying a debt with eUJP the member data on fulfilling the conditions for accessing information resources are updated;
  - in loan renewal with the **Renew all** option.

#### V6.13-03(04), 20 November 2017

- Bug fix in entering the visit by a member using the method **Member / Enter visit**, when data other than membership card number is used for member identification.
- Bug fix in loan renewal for items with loan restriction in the subfield 996/997u.

- Bug fix in lending forms and invoices.

#### V6.13-03(03), 15 November 2017

- Bug fix in performing the method **Field 996/997 / Enter transaction with material in reading room**.

#### V6.13-03(02), 14 November 2017

- When registering a new member with the option of transferring data from the reference student database the option to check for duplicates is also performed in libraries that do not use the shared database of members.
- When changing the data **Type of school** the schooling data related to the value of this attribute is deleted for the member.
- Bug fixes in:
  - recording of dates in loan transaction files;
  - returning of individual issues of a serial placed in the mobile library to a department they were not borrowed from;
  - displaying information about placing the material in the mobile library;
  - considering the privileges when logging into the COBISS3 system and transitioning to individual loan departments;
  - recording cash register transactions for the purposes of non-cash debts settlements outside of the library;
  - returning the material to a department it was not borrowed from without selecting a member;
  - deleting invalid numbers;
  - sending a notification about reservation cancellation.

#### V6.13-03(01), 30 October 2017

- Bug fix in creating overdue notices for libraries, where the restriction "Outside loan not permitted" is set for members upon receiving the highest overdue notice.

#### V6.13-03, 28–29 October 2017

- When renewing loans for material with the entered availability level (subfield *996/997p – Availability level*), libraries can decide to consider the availability level and not the time specified for this material type in the time parameters table. To enable this option, libraries must send a request to IZUM.
- In the libraries of the Biotechnical Faculty, the "Outside loan not permitted" restriction is now shared information.
- When registering a new member with the option of transferring data from the reference student database, the option to check for duplicates on the basis of name, surname and date of birth is added. Until now, the check could only be done on the basis of user numbers.
- If the search request delivers no results when searching in the catalogue, the input focus is moved to the **Search** button.

- The search by COBISS.XX-ID in the **Unavailable material** search window is possible even if the library does not have the COBISS3/Interlibrary Loan software module included.
- Bug fix in the display of the **School name** attribute in the **Member** search engine hits.
- Bug fix in the procedure, when the material loaned to the member in the reading room is put on outside loan.
- Bug fix in quick return (**Unavailable material / Return, delete**) of serials.

#### V6.13-02, 17 October 2017

- In the **Loan** module, the **Bibliographic record** class is added, which enables setting the default search fields in the catalogue also for the employees, who only have privilege to work in the Loan module.
- When individually or batch updating member details, the option to turn off the update of the member category data is added (the data is updated on the basis of the data on the mode of study in the reference students database). To enable this option, libraries must send a request to IZUM.
- When individually or batch updating member details, the check for matching the member's name and surname in the local and reference database is no longer case sensitive.
- Bug fix in sending the notification on reservation cancellation.

#### V6.13-01, 12 October 2017

- The option to turn off software control when loaning additional copies of a monograph already on loan to the member in the same department was added. To enable this option, libraries must send a request to IZUM.
- When individually or batch updating member details (methods **Member / Update member details – student** and **Member / Update members details – students**), the e-mail address is not updated.
- The "OVR" overdue notice indicator is removed even if the last copy of a material with overdue notice is returned to a different department from the one that loaned it.
- Bug fix in reserving unavailable serial issues.
- Bug fix in debts settlement for non-members.
- Bug fix in setting the price list status.

#### V6.13-00(01), 3 October 2017

- Bug fix in reserving unavailable material through COBISS+.
- Bug fix in settling debts in libraries that only enter non-cash payments outside of the library because they are not liable to fiscal verification of invoices.

#### V6.13-00, 30 September–1. October 2017

- The following is enabled for statistics purposes:
  - User defined classifications can be created.



- In order to classify the data in the statistics you can create user defined classifications adapted to the needs of the library. You create the user defined classification by copying the system definition and by duplicating the user classification you can create any number of new classifications adapted to the needs of the library.
- When creating statistical reports you can select another classification (system or user defined) instead of the classification set by the system.
- In statistical reports where no activities were entered in the classification for a category the symbol "-" (hyphen) is displayed.

Working with classifications is described in the instruction [COBISS3/Reports – classifications](#) available on the *Training* portal.

Based on the needs of general libraries a new set of statistics definitions (a total of 73 statistics), which includes the above mentioned options, is created. In new statistics the requirements for additional criteria for data classifications (e.g. by library departments) were also taken into account and cash register transactions statistics were also added. You can find the definitions of new statistics in the subfolder **Reports / Standard / Loan / Statistics (user classifications)**. They are divided into four sections (subfolders). These are:

- *Members* (for creating statistics of active members),
- *Visits* (for creating statistics of visits),
- *Transactions* (for creating statistics of transactions) and
- *Cash register* (for creating statistics of cash register transactions).

All statistical reports definitions that were available until now remain unchanged and can still be used. They are saved in the **Reports / Standard / Loan / Statistics** subfolder.

Regarding the need of libraries to create statistics in .xls format (MS Excel) we would like to inform you that the reports and statistics can be converted to this format from the .pdf format if you have the appropriate version of Adobe Acrobat (e.g. Adobe Acrobat Pro DC). Adobe Acrobat software namely enables you to save the contents of the file as an MS Excel workbook, where you can further edit the data, by selecting the option *Tools / Export PDF / Spreadsheet*.

- In the COBISS3/Repots software module the content of the subfolder with reports definitions for loan purposes (**Reports / Standard / Loan**) is rearranged. The reports definitions are saved into three subfolders. These are:
  - *Lists* (reports definitions of lists for loan purposes: *Members, Material, Members and material, Overdue notices, Cash register operations, Transactions, Routing of serials, Membership card*);
    - The report *LOAN-EXP-01: List of uncollected debts* is moved to the subfolder *Overdue notices*.);
  - *Statistics* (definitions of statistical reports for loan purposes available until COBISS3, V6.12-00(10));
  - *Statistics (user classifications)* (reports definitions for loan purposes, where the use of user defined classifications is available).
- In the toolbar of the browser you can add buttons for quick access to the following class methods with the **Toolbar settings** option (right click the mouse in the

toolbar): **Material / Catalogue, Member / Home library material, Member / Enter visit, Unavailable material / Return, delete, Unavailable material / Process reservations, Unavailable material / Prepare reserved material for collection and Department / Transition to another department.**

- The size of the editor windows and some editor elements can be changed by placing the cursor at the edge of the window and dragging it accordingly. In this way you can also increase the size of the **Pricelist** window, for instance.
- If the library includes the option to renew the due date in all departments where the member has entered material when renewing the loan of all material copies, the renewal option is offered only if the member has entered material at least in one other department besides the current department.
- If the library includes the option to set the restriction "Outside loan not permitted" when the member receives the last (highest) overdue notice, the option for deleting this restriction is offered when the member returns the last copy of the material with the highest overdue notice.
- The option to automatically close the **Home library material** window after printing the lending form (**Lending form** button in the **Home library material** window) is added. To activate this option the library must send a request to IZUM.
- If you wish to enter the loan of additional copies of a monograph already on loan to the member (copy of the material is from the same COBISS.SI-ID) in the same department, a message appears and the person in charge of loan must decide whether or not to loan the additional copy of the material despite that.
- The return of material in all departments is now also possible without selecting a member with the **Unavailable material / Return delete** method. In the **Home library material** window the read accession number or the loan number is transferred to the "IN/CN" field. From this point forward the return process is unchanged.
- In the case of quick member search (**Member / Search by key**), search of a member for loan (**Member / Home library material**) and when entering a member visit (**Member / Enter visit**) with the card number that belonged to the member deleted from the database and if it was selected to keep the card number unavailable, a message appears, saying the member was deleted from the database.
- In the case of returning a copy that has a status set in the holdings data (subfield 996/997q – *Status*) a message about this appears.
- The list of attributes of the classes **Outside loan, Interdepartmental loan, Material routing, Interlibrary loan, Reservation of a copy, Reservation of material** and **Reading room loan** displayed in the browser when you select a copy is supplemented with the display of attribute values **Temporary location (e\E)**. This means that the attribute is also available in the *Data export software* in the related classes **Home library material** and **Returned home library material**.
- The report of data about loaned copy status (**View** button) displayed in the **Insight into the library material status** window is supplemented with the status of the copy (ST=) and temporary location (E=).

- When returning the material the title of the returned copy is also displayed in the **Home library material** window in the information about the last returned copy. If the title is too long, it is shortened with an ellipsis.
- On the slip with reservation details printed after you prepare the reserved material for collection the information in bold on whether a message on this member has been sent appears.
- When entering a debt settlement payed in cash, you need to enter the amount given to you by the library visitor in the "Cash" column. Until now the amount of the due debt was automatically entered.
- If there is no set default login department for one of the usernames in a library with departments, the user logs in to the department entered first in the local code list *Departments (CODE 301)* when logging into COBISS3.
- Supplemented and added options for libraries using RFID devices:
  - The option for checking and changing the material protection status (method **System / RFID device/protection status**). In this check window you can also check if the RFID device is working or not.
  - When returning material with the **Unavailable material / Return**, delete method the message window displays accession numbers of all available copies if copies with the status available are also read.
  - When returning material with the **Unavailable material / Return**, delete method the return process is offered and performed for all entered copies of the material if copies with the status available are also read.
- Reports for loan purposes:
  - A new report *LOAN-MM-07: List of reserved material* enables you to create a list of reserved unavailable material (status *R*) together with a list of members who reserved the material.
  - The report *LOAN-Mt-02: List of most requested material* is supplemented so that you can use a separate form *Overview of all included material* for all material items included on the list to see the collective overview of the number of loans, renewals and reservations. The form is created in a way that enables you to save it with an appropriate version of Adobe Acrobat (e.g. Adobe Acrobat Pro DC) as an MS Excel workbook where you can further edit the data.
  - The report *LOAN-STA-Mt03: By type of material (physical form)/months* – in classifying data by physical form the contents of the subfield *001b – type of record* are taken into account.
- Bug fix in the reservations of bound issues of serials for the reading room.
- Bug fix in printing the slip with the reservation data in the case of returning reserved material.
- Bug fix in charging the costs of overdue notices in libraries where the cost of the new overdue notice covers the cost of the previous overdue notice: this also happens if the member already received an overdue notice for the same material.
- Bug fix in the inclusion of a new loan department: a cash register for this department is also created.

- Conditions for the due date renewal at the self-checkout and the automated phone service are equalized with the conditions for the due date renewal with My library service.
- Bug fix regarding the calculation of the number of visits: in the case of entering transactions in loan for the previous period, the entered transactions are considered as a new visit from a member when calculating the number of visits.
- Bug fix: expired reservations can be deleted with the basic privilege for working in loan (LOAN\_BASIC).

**V6.12-00(10), 7 September 2017**

- In the e-mail received by the member when they perform a payment in My library the title of the notification is changed, printing of data about the library and the date of payment is added, the printing of the text *This is an automatically generated message ...* is removed.

**V6.12-00(09), 28 August 2017**

- Bug fix regarding the deletion of expired reservations.
- Overdue notice:
  - bug fix regarding the display of the overdue notice recipient address if the postal address for overdue notices was changed
  - bug fix regarding the sending of the notification about forthcoming overdue notice

**V6.12-00(08), 23 August 2017**

- Bug fix regarding the checking of the reservation existence in the department that made the reservation (when reserving and when returning through self-checkout).
- Bug fix regarding the creation of overdue notice for material on loan (reading room) –the overdue notice is not created if the expiry date has not yet expired.
- Bug fix regarding the cancellation of a debt entry for an uncollected reserved material when batch deleting expired reservations.
- Bug fix regarding the duplicate of a postcode for foreign citizens in the *Registration form* report.
- Bug fixes concerning conditions for remote access and the preparation of the file with member details for the needs of the National and University Library (NUK).

**V6.12-00(07), 17 August 2017**

- Updates concerning the preparation of the file with member details for the needs of the National and University Library (NUK).

**V6.12-00(06), 9 August 2017**

- In COBISS+ and COBISS/OPAC the reservation of material that is on loan indefinitely is disabled.

- The option of using the user report definition instead of the standard definition.
- Updating the conditions for remote access for the needs of the National and University Library (NUK).
- Adding the option of preparing the file with member details for the needs of the National and University Library (NUK).

#### V6.12-00(05), 15.–16. July 2017

- Bug fixes regarding routing lists:
  - as long as the status of the routing list is "valid", the material is on loan and it is not possible to change the holdings status;
  - for routing lists, the status "valid" can be changed only when none of the relevant issues is on loan.

#### V6.12-00(04), 8.–9. July 2017

- Bug fix regarding the control of signing the registration statement.
- Bug fix regarding the privileges for issuing an invoice copy (now basic privileges for working with the cash register suffice).
- Bug fix in the display of the reservations processing period in the LOAN-MM-01 report.
- In the catalogue it is possible again to use arrow keys to move in the search results list.

#### V6.12-00(03), 3 July 2017

- The display of the alternative number (student number or user number) is now included in the member data within the report LOAN-Mb-08.
- Shared database of members: control of data entry for member categories updated, where it is no longer mandatory to enter the date of birth.
- The width of the data that appears on the lending form for newly received reservations changed.

#### V6.12-00(02), 27–28 June 2017

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

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

- Bug fix 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.
- Bug fixes 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)).
- Bug fix regarding the addressing of overdue notices for underage library members.





- Bug fix regarding the display of the copy status and the reservation options in departments with non-automated loan.
- Bug fix regarding invoice cancellations for non-members.
- Reports for loan purposes:
  - 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.
  - 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.
  - 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".
  - 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".
  - 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.
  - 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.
  - 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.
  - 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.
- Bug fix 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.
- Bug fix 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.
- Bug fix regarding the preparation of overdue notices for material on reading room loan (status S).

#### V6.11-01, 3 May 2017

- Bug fix 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 bug fix was made regarding the preparation of overdue notices in the format *1 – A4 format/address right*.
- A bug fix 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 bug fix 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.

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

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

- Bug fix 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.

#### V6.10-00(01), 30-31 January 2017

- 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.