

3.7 CHANGING CLASS OR GRADE

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

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



Note:

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

Condition

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

To change the class or grade:

Procedure

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

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

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

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



Tip:

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

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

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

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

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

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

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

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

During the procedure, automatic messages will appear.

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

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

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



Note:

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