

4.2 HOME LIBRARY MATERIAL EDITOR

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

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



Tip:

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

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



Note:


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

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

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



Tip:

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

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

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



Tip:

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



Tip:

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



Tip:

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

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

1st column

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

2nd column

- material ID

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

3rd column

- description of material

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

4th column

- item's parent department

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

5th column

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

6th column

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

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

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

7th column

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



Note:

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

8th column

- number of days of delay

**Tip:**

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

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

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

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

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

Procedures

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

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

**Tip:**

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

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

**Tip:**

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

**Note:**

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



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

**Tip:**

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



Tip:

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



Tip:

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

<Alt> + <I> = Lend

<Alt> + <V> = Return

<Alt> + <A> = Retain

<Alt> + <P> = Renew

<Alt> + <R> = Reserve

<Alt> + <K> = Catalogue

<Alt> + <G> = View

<Alt> + <C> = COMARC

<Alt> + <D> = Lending form

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

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

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



Tip:

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



Note:

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

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