

## 4.5 RETURNING MATERIAL

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



Note:

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

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

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



Tip:

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

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

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

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

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

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

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



Note:

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

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

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

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

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

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

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

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



Tip:

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



Note:

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

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

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

## 4.5.1 Returning material without selecting the member

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

### *Precondition*

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

### *Procedure*

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

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

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

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

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



#### Tip:

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

### *Options*

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

### 4.5.1.1 Returning serials

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

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

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



Note:

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

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## 4.5.2 Returning material with member selection

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

### 4.5.2.1 Returning material by entering the item's ID number

#### *Procedure*

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

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

2. Select the member.

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

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

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

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



Note:

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

#### 4.5.2.1.1 Returning serials

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

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

#### 4.5.2.2 Returning material by selecting it from a list

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

##### *Procedure*

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



Tip:

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

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



Tip:

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

#### 4.5.2.3 Returning material with restriction

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

**Precondition**

Return with restriction is possible:

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

**Procedure**

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



Note:

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

2. Click the **Retain** button.



Tip:

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

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

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



Note:

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

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

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



Note :

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



Notes:

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

*Status B validity expiry date can only be changed manually.*

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

#### 4.5.2.4 Returning material in any department

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

##### **Precondition**

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

##### **Procedure**

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

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

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

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

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

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

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



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

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

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

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



Note:

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

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

#### **Procedure**

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

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

2. Enter two-digit department ID.

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

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

4. Click the **Return** button.

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

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