4.9 PRINTING LENDING FORMS

In the **Home library material** window, you can print out a lending form, i.e. the list of material recorded for the member.

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 other data (see chapter *4.1*).

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

3. Click the **Lending form** button.

   The **Overview and sending of created report** window will open. Use it to send the report to previously defined or changed destinations. The process of preparing and sending a report is described in the COBISS3 Basic Guidelines User Manual (see chapter *4.5*).

Note:

In libraries with departments the list of material recorded for the member is printed for the department in which you are signed in as a user.

Note:

If a library uses COBISS3/Interlibrary Loan software module and lends the material from its library collections through interlibrary loan to its members, the material that you reserved for the member or lent to the member through interlibrary loan will also be displayed on the lending form.

Options

You can also print out a lending form by finding the member in the **Member** class and then selecting the **Object / Print** or **Object / Send** method.

4.9.1 Creating lending forms and invoices

Use the procedure to create, edit, archive or delete lending forms and invoices. The form is defined and maintained by the library information service, and the content is defined and maintained by the library. The set lending forms are used when creating lending forms in the **Home library material** window, when you press the **Lending form** button. The set invoices are used when creating an invoice in the **Debts settlement** window, when you press the **Send** button. If you select a specific setting, a lending form can be sent to a library member's e-mail address.

> Note:
>
> *If a library has no lending forms and invoices prepared, default lending forms and invoices will be used. Default forms contain general data and texts in the domestic language. Printing lending forms and invoices on the narrow format (thermal printer) is set as default. Default forms cannot be edited or deleted!*

> Note:
>
> *To create lending forms and invoices, the* LOAN_EDT – Changing loan parameters *privilege is required.*

> Note:
>
> *If a library, before this change, already had a special parameter set up to create lending forms and invoices (e.g. member name and surname, librarian's name and surname, additional data on material, cash amount and change, list of outstanding debts, etc.) in the COBISS3/Loan software module, based on the Loan minutes, the content of lending forms and invoices was already configured by IZUM.*
>
> *Furthermore, lending forms and invoices were configured for a library if the library already customized variables for a lending form and invoice, by moving a signature and note on lending form from the Standard folder to the User folder and were customized there according to their needs.*
>
> *Customized forms are called* Customized forms (IZUM).

Procedure

1. Highlight the **Home library** class and select the **Create lending forms and invoices** method.

   The **Lending forms and invoices** window will open, where data on the currently valid lending forms and invoices will be displayed.

2. Select one of the procedures to continue with maintaining lending forms and invoices:

   - Creating new forms
   - Editing forms
   - Activating forms
   - Deleting forms

3. After clicking the **Select** button, continue the selected procedure or cancel the procedure by clicking the **Exit** button.

4.9.1.1 Creating new forms

You can create a new form group for lending forms and invoices on the basis of default forms or by using forms that were already prepared.

Procedure

1. In the **Lending forms and invoices** window, select the **Create new forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.

   The **Create new forms** window will open.
3. In the *Form group* field, enter the name of the new form group and confirm by clicking the **OK** button.

> Note:
>
> *New form groups are saved in the form of a file; for this reason, the following characters must not be used:* <, >, :, ", /, \, |, ?, *.

The **Form groups** window will open.

> Note:
>
> *When you create lending forms and invoices for the first time, the* Form groups *window will not open, because no new forms were prepared. In that case, when creating new forms, data from default forms will be used.*

4. Select one of the previously prepared form groups for lending forms and invoices that you will use to create new forms.
5. Confirm the selection of the form group by clicking the **OK** button.

   The **Edit data on lending forms and invoices window** will open. In the title bar you can see the name of the new form group that you will edit. All the data from the form group that was previously selected will be displayed in the window. The window is divided into three panes.

   Individual columns contain:

   1st column – **Applies to**

   In libraries with departments, the names of departments with automated loan, for which the data defined on the lending forms and invoices will apply, will be displayed in individual rows. In libraries with no departments, *Home library* will be displayed in the only row.

   2nd column – **Format**

   In this column, by clicking the selected cell, a drop-down list will be displayed, where you can select one of the values to define the lending form and invoice format. You can choose one of the following values:

   - *0 – narrow format (thermal printer)*
   - *1 – wide format (A4)*

Note:

In this column, you must be careful to ensure that the selected format for the relevant printer is set in accordance with the settings of the logical destination (Lending form – Loan) when you are logged in with your username. If you print lending forms and invoices to different printers in different departments under your username, you must, after you log into the COBISS3 software, edit the settings for the relevant printer in the logical destinations.

3rd column – **Destination**

In this column, by clicking the selected cell in the table, a drop-down list will be displayed, where you can select one of the values to define a destination or a combination of destinations to which the lending form should be sent (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). The destination setting does not apply to invoices, as invoices are always sent to printers. You can choose one of the following values:

- *0 – printer*
- *1 – printer or e-mail (Ctrl)*
- *2 – e-mail*
- *3 – printer and e-mail*

Note:

Sending a lending form to a member's e-mail address is intended only for lending forms. A lending form that is sent to a member's e-mail address always contains all the material that was entered.

4th column – **Select material**

In this column, by clicking the selected cell, a drop-down list will be displayed, where you select one of the values to determine which material will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). All the material from the login department will be displayed as default. You can select one of the following values:

- *0 – all material*
- *1 – all material or selected material (Ctrl)*
- *2 – selected material*

5th column – **Today's material**

In this column, by clicking the selected cell, a drop-down list will be displayed, where you select one of the values to determine whether all material or only today's material will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). All the material from the login department will be displayed as default. You can select one of the following values:

- *0 – all material*
- *1 – all material or today's material (Ctrl)*
- *2 – selected material*

6th column – **All departments**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether material from all departments will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). Only the material from the login department will be displayed as default. You can select one of the following values:

- *0 – department's material*
- *1 – department's material or material from all departments (Ctrl)*
- *2 – material from all departments*

7th column – **Additional data on material**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether an additional data will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). Only the title of the material will be displayed as default; only one additional data can be displayed. You can select one of the following values:

- *0 – no additional data*
- *1 – accession number/issue number*
- *2 – author/data on serial*
- *3 – call number*

8th column – **Outstanding debts**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether a list of outstanding debts for the member will be displayed on the lending form. A lending form without outstanding debts will be displayed as default. You can select one of the following values:

- *0 – no outstanding debts*
- *1 – outstanding debts*

9th column – **Borrowed material (on invoice)**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether a list of borrowed material will also be displayed on the invoice. An invoice without the list of borrowed material will be displayed as default. You can select one of the following values:

- *0 – without borrowed material*
- *1 – with borrowed material*

10th column **– Cash and change (on invoice)**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether cash and change amount will also be displayed on the invoice. An invoice without cash and change will be displayed as default. You can choose one of the following values:

- *0 – cash and change*
- *1 – without cash and change*

11th column **– Preview**

In this column, numeric values of data used on the lending forms and invoice are displayed in the cell of the table.

Tip:

If you wish to see the content in numeric values, you can use the screen tip. If you place the mouse cursor on the selected cell, types of data that can be used on lending forms or invoices will be displayed. First you will see the content of the values used on default lending forms and invoices.

In the upper right part of the window, select the type of data that you wish to edit from the drop-down list. In the **Preview** column, you can edit one or several types of data. An individual type of data can have several content versions, based on the department where the lending form or invoice was prepared (applies to libraries with departments).

When you first edit the data, default content will be displayed under the selected type of data. An individual content version is marked with a number, based on which the selected content is visible in the **Preview** column.

Positions of individual types of data are displayed as an example on the invoice for the narrow format, which includes a list of material (see figure 4.9-1).

You can choose between four different types of data:

1. **Data on department/additional data**

   Data on the library name or the superior partner (if specified in the home library) will be displayed on default lending forms and invoices. Right below the library name, the address and contact details of the library department will be displayed. If the library does not have departments, the address and contact details of the home library will be displayed by default (phone, FAX and e-mail).

   The library can use a new content version to replace the default data on the department and the contact details with other text. In this case, the desired content must be entered for this type of data. If a library with departments wishes that the department name is also displayed, they must include the variable value %library department% or enter the department name manually.

2. **Additional member data**

   The *membership card number* and *member name and surname* data already contains the default value, which can be changed by editing the current content version or adding a new one. If you wish only for the *membership card number* data to be displayed, remove the second part of the selected type of data, or remove both parts of the selected type of data.

3. **Note on invoice**

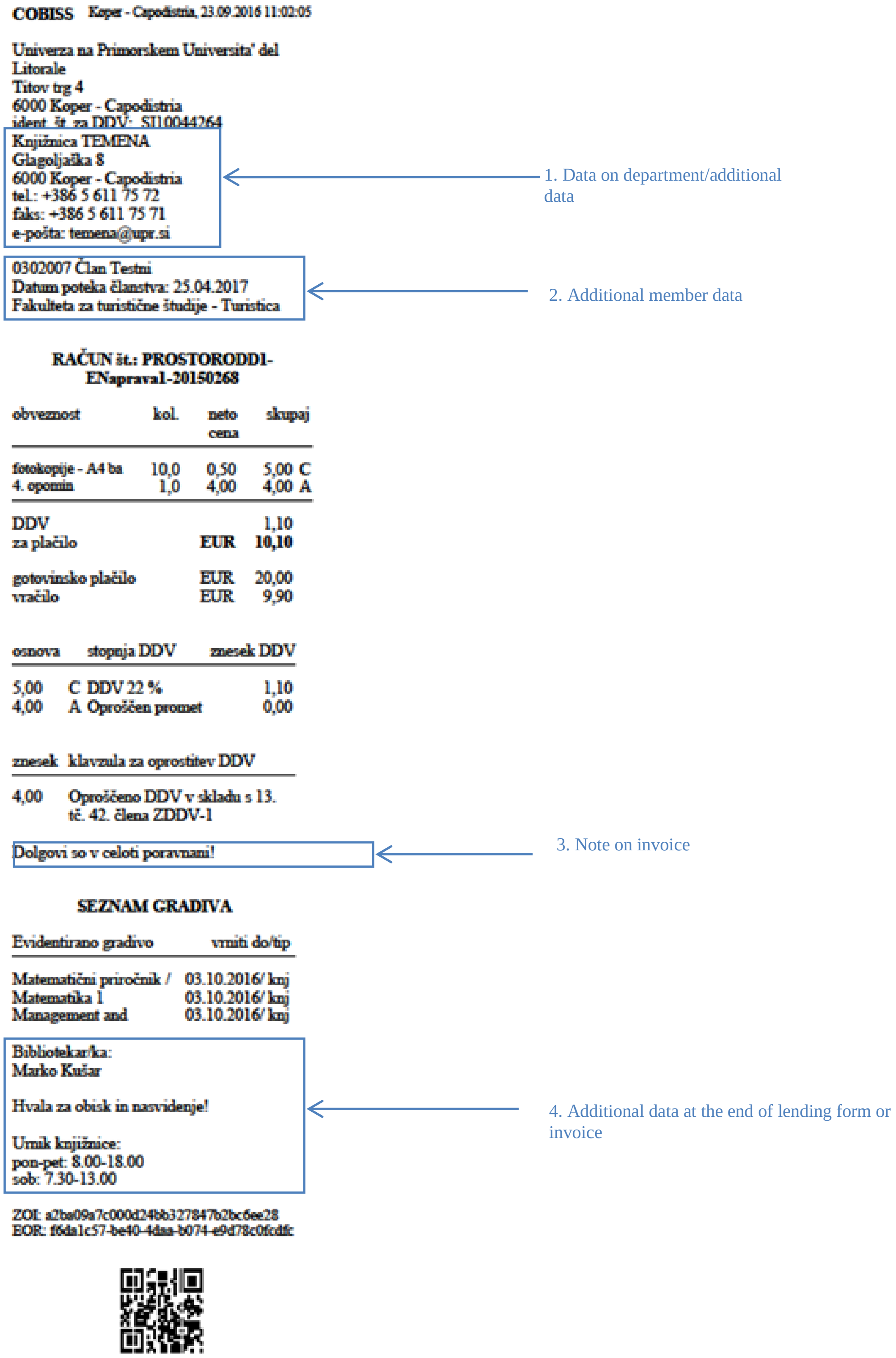
   The *note on invoice* data already contains the default value, in the place of which the note that was entered when you created the invoice in the **Debts settlement** window under »Note (to be displayed on invoice)« will be displayed. If you wish the note that was entered when creating an invoice not to be displayed on the printed invoice, the value must be removed from the existing content version or a new content version must be added.

4. **Additional data at the end of lending form or invoice**

   This type of data already contains the default text »Lent by«, the variable value for the *librarian's name and surname* data and the default text *"Thank you for visiting our library. We look forward to seeing you again soon.«* You can edit the existing content version or add a new version and change it accordingly.

Note:

In libraries that are liable for fiscal verification of invoices, the display of data on the person who borrowed the material is obligatory. For this reason, it is best not to change the default settings.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Univerza na Primorskem Universita' del Litorale
Titov trg 4
6000 Koper - Capodistria
ident. št. za DDV: SI10044264

Knjižnica TEMENA
Glagoljaška 8
6000 Koper - Capodistria
tel.: +386 5 611 75 72
faks: +386 5 611 75 71
e-pošta: temena@upr.si

0302007 Član Testni
Datum poteka članstva: 25.04.2017
Fakulteta za turistične študije - Turistica

RAČUN št.: PROSTORODD1-ENapraval-20150268

obveznost	kol.	neto cena	skupaj
fotokopije - A4 ba	10,0	0,50	5,00 C
4. opomin	1,0	4,00	4,00 A

DDV		1,10
za plačilo	EUR	10,10
gotovinsko plačilo	EUR	20,00
vračilo	EUR	9,90

osnova	stopnja DDV	znesek DDV
5,00	C DDV 22 %	1,10
4,00	A Oproščen promet	0,00

znesek	klavzula za oprostitev DDV
4,00	Oproščeno DDV v skladu s 13. tč. 42. člena ZDDV-1

Dolgovi so v celoti poravnani!

SEZNAM GRADIVA

Evidentirano gradivo	vrniti do/tip
Matematični priročnik /	03.10.2016/ knj
Matematika 1	03.10.2016/ knj
Management and	03.10.2016/ knj

Bibliotekar/ka:
Marko Kušar

Hvala za obisk in nasvidenje!

Urnik knjižnice:
pon-pet: 8.00-18.00
sob: 7.30-13.00

ZOI: a2ba09a7c000d24bb327847b2bc6ee28
EOR: f6da1c57-be40-4daa-b074-e9d78c0fcdfc

Figure 4.9-1: Example of an invoice with types of data displayed for narrow format (thermal printer)

"Field for editing the selected data type:", where you can edit the content to be displayed on lending forms and invoices, is at the bottom part of the window. You can save several content versions, and each version will be in its own numbered row. Under the selected type of data, select the content version that you wish to edit. The selected content will be displayed at the bottom part of the window, where you can change it accordingly.

> Note:
>
> *When editing data, do not use the % character as this character is reserved for entering variable values.*

To edit the content of the selected type of data, you can use the following functions or button:

- **Insert variable value**

  When editing data on forms, you can use pre-prepared variable values, in the place of which an actual value will be displayed on the lending form or invoice.
  You can enter the following variable values:

  – member name and surname

  – librarian's name and surname

  – library department

  – membership expiry date

  – member's faculty

  – membership card number

  – note on invoice

- **Save**

  Use the **Save** button to save the changed content version.

> Tip:
>
> When editing data, you can also use the *Insert variable value* function. By using this function you can turn on the selected variable value in the place of which the actual value will be automatically displayed on the prepared lending form or invoice (*membership expiry date*, *note on invoice*, etc.).

- **Add**

  Use the **Add** button to define new content for the selected type of data.

You can do this by selecting the content version for the selected data type, updating it if necessary, and clicking the **Add** button. For one type of data you can add several content versions; each version will receive its own running number, which cannot be changed. Content versions may not be sorted by order number.

- **Delete**

  Use the **Delete** button to permanently delete the selected content version in the upper right part of the window. You can do this by selecting the content version for the selected data type and clicking the **Delete** button.

> Note:
>
> *If the content version is used in the form group for lending forms and invoices, it cannot be deleted. You will be automatically notified where in the cell in the* »Preview« *column the content version was used.*

- **Up**

  Use the **Up** button to move the selected content version in the upper right part of the window for one or several rows up. When moving the content version, its current number does not change as it is related to the content version for the type of data.

- **Down**

  Use the **Down** button to move the selected content version in the upper right part of the window for one or several rows down. When moving the content version, its current number does not change as it is related to the content version for the type of data.

The buttons for saving and cancelling the creation of lending forms and invoices:

- **OK**

  By clicking the **OK** button you save the existing or newly prepared forms group for lending forms and invoices.

- **Cancel**

  By clicking the **Cancel** button you exit the data editor for lending forms and invoices without saving.

4.9.1.1.1 Editing data on lending forms and invoices

You can edit data on lending forms and invoices in the »Preview« column in a table. In individual cells, numerical values for displaying data in the home library or in a specific department (in libraries with departments) are listed. In the **Editing data on lending forms and invoices** window you can edit four types of data.

In each cell there are four numbers, separated by a comma, which represent different types of data on lending forms and invoices. The default values are *1*, but the library can change these.

Procedure

1. Use the mouse to highlight the selected cell in the »Preview« column for the home library or for a specific department (in libraries with departments).
2. Then select the desired type of data and the content version for this type of data from the drop-down list in the upper right part of the window. Double-click to confirm the selected content version. The current number of the content version (visible at the beginning of the row) will be transferred to the highlighted cell to the place that is defined for this type of data (e.g. type of data *3. Note on invoice* in the highlighted cell will be transferred to the place with the current number of the content version).

   Continue editing lending forms and invoices in every cell in the home library or in a specific department (in libraries with departments).
3. Save the changes in the form group by clicking the **OK** button.

Tip:

In libraries with departments you can copy the content of an individual cell into other cells in the »Preview« column (e.g. the content of data to be displayed in the first department is the same or similar to all other departments).

You can copy the content by highlighting the selected cell with a mouse and press <Ctrl> + <C>. Then highlight the desired cell or several cells at the same time (e.g. for all departments at the same time) and paste the content by pressing <Ctrl> + <V>. If only one content version for a specific type of data (e.g. *4. Additional data on the lending form and invoice*) is different, change only this data in the selected cells of an individual department.

4.9.1.2 Editing forms

Select the option of editing lending forms and invoices if you wish to change or update the data in the already created forms.

Procedure

1. In the **Lending forms and invoices** window, select the **Edit forms** radio button.
2. Confirm the selection of the procedure by clicking the **Select** button.

   The **Form group** window will open.

Note:

Default lending forms and invoices cannot be edited. If a library has not yet created new forms and the Edit forms *procedure is selected, a note that says that default forms cannot be edited will be displayed. New forms must be prepared on the basis of default forms.*

3. Select one of the previously prepared form groups for lending forms and invoices and confirm the selection by clicking the **OK** button.

   The **Edit data on lending forms and invoices** window will open. In the title bar you can see the name of the form group that you selected for editing.

   Continue the procedure of editing forms in the **Edit data on lending forms and invoices** according to instructions (see chapter *4.9.1.1*).

4.9.1.3 Activating forms

In a library that does not create lending forms and invoices, default forms are valid. Activating new or already existing form groups for lending forms and invoices can be activated only when all the necessary data for form groups are edited and saved.

Procedure

1. In the **Lending forms and invoices** window, select the **Activate forms** radio button.
2. Confirm the selection of the procedure by clicking the **Select** button.

   The **Form group** window will open, where you can select one of the prepared form groups for lending forms and invoices that you wish to activate.

   You can also select default lending forms and invoices.
3. Confirm the selection of the form group by clicking the **OK** button.

   Currently valid form group will be displayed in the upper part of the **Lending forms and invoices** window.

4.9.1.4 Deleting forms

A library can permanently delete the prepared form groups for lending forms and invoices if they are no longer needed.

Note:

Default lending forms and invoices as well as currently valid lending forms and invoices cannot be deleted. If you select the valid form group, you will automatically receive a notification that you cannot delete it.

Procedure

1. In the **Lending forms and invoices** window, select the **Delete forms** radio button.
2. Confirm the procedure by clicking the **Select** button.
3. The **Form group** window will open, where you select one of the prepared form groups for lending forms and invoices that you wish to permanently delete.

> Note:
>
> *If there is only one form group for lending forms and invoices prepared in a library, you will be automatically asked if you are sure you want to delete the form group.*

4. Confirm the selection of the form group by clicking the **OK** button.

   Form deletion will be performed only after a question appears on the screen and you confirm the deletion by clicking the **Yes** button. You can cancel the deletion by clicking the **No** button.

5. The selected form group will be deleted and you will be returned to the **Lending forms and invoices** window.