

The COBISS3 software Version V6.2-00, March 2015

Description of new features in the COBISS3/Loan software module

The following changes and updates were added to version 6.2-00 of the COBISS3/Loan software module:

1. Entering a visit

By using a special method, a library can enter a visit when the visit is not recorded automatically. This is a visit in the part of the library, where loan is not recorded with a computer (reading room, information desk, etc.), a visit of a member who visits the library to get internet access or a visit of a person who is not a library member. To enter a visit, use the **Enter visit** method in the **Member** class. When entering a visit, you can identify the member by their membership card number or any other data in the **Member** search window.

A visit entered in this way is taken into account in data on the visit for an individual member and also in statistics of visits and transactions.

Upon the library's request, a special parameter can be set up to check membership validity when entering a visit.

2. Recording transaction with material in reading room

If a library wishes the loan in the reading room to be taken into account in loan statistics, a transaction with material in the reading room can be recorded even if loan is normally not recorded there. For this purpose, use the **Record transaction with material in reading room** method in the **Field 996/997** class. When recording a transaction in the reading room, enter only identification number of the material; data on the member who borrowed the material in the reading room is not entered; for this reason, a visit of this member is not entered.

3. Reason for deletion/writing off debts

If a library created the local code list *Reasons for deletion/writing off debts (CODE 317)*, the reason for deletion or writing off debts will have to be selected from the code list when deleting or writing off debts. At the moment, a reason for deletion/writing off debts can be entered when deleting entered debts or an individual overdue notice for the member and writing off automatically entered debts (fine, loan fee, cost of notification about

availability of reserved material, cost of reservation of available material, cost of uncollected reserved material and cost of issuing a new membership card).

4. Individual membership fee

Until now, a library could only set the membership validity period for its members on the level of the library and enter debts for the membership fee or admission fee according to individual member categories. By using the »Membership expiry date« attribute and entering the date manually, the period could be changed for the member, the software, however, did not support automatic calculation of debts for the shortened membership. From now on, a membership fee for the shorter period, which is not related to a member category, can also be entered. This type of entering a membership fee can be used as part of the current membership fee or admission fee calculation type or as an individual calculation type. A library must prepare the local code list *Type of membership fee – individual (CODE 318)*, where codes and values are entered in the required structure. On the basis of this code list, membership validity period is defined for the member under the »Membership validity« attribute. The »Membership expiry date« attribute will be automatically calculated, and the corresponding membership fee will be automatically entered. A library must define the type of service/debts *24 – CLS membership fee – individual* in the price list of the library (or department, if the library has different price list for different departments) and define the value *automatically* under »Calculation method«.

5. New attribute "Membership validity" in the Member editor

In connection with entering individual membership fee, the new attribute »Membership validity« attribute was added to the Membership tab, where you can, on the basis of the local code list *Type of membership fee – individually (CODE 318)*, enter the membership period for the member, which will be taken into account for the automatic calculation of the membership expiry date and for entering the relevant type of individual membership fee, which is defined in the library price list.

6. New attribute "University" in the Member editor

In the **Member** editor under the **Schooling, employment** tab, the new attribute »University« is added, where you can select a university at which the member is enrolled or employed from the university code list.

7. Entering debts for reservation of available material, uncollected reserved material or issuing a new membership card automatically

A library can automatically enter debts for its members for the following types of services/debts:

- cost of reserving available material
The debt is entered when the reserved material is put on loan (*status O – reserved available copy (loan)*), if the price is entered in the price list under type of service/debts *NAR – reservation of available copy* and the value *automatically* is selected under »Calculation method«.
- cost of uncollected reserved material
The debt is entered when the expired reservation is deleted for the member, if the material was ready for collection (*status W (loan)*) and the item *ZNR – uncollected material* is entered in the price list, and the value *automatically* is selected under »Calculation method«.
- cost of issuing a new membership card
The debt is entered when a new member is entered, if the item *NIZ – new membership card* is entered for the selected member category in the price list, and the value *automatically* is selected under »Calculation method«.

8. Statement signature control

Upon the library's request it is possible to specify by means of a special parameter that a control is performed on whether the member signed the statement when becoming a library member. If the check-box next to the "Statement signed" attribute is not ticked, a message will be displayed when switching to the **Member** editor and the **Home library material** window. To continue with your work, confirm the message by clicking the **OK** button.

9. Lending reading room material for outside loan

Material that is on loan in the reading room (*status S – on loan (reading room)*), can be put on outside loan if you select it in the list of recorded material in the **Home library material** window, select the **Outside loan** radio button and click the **Lend** button.

10. Loan restriction for last issue of serial

A library can restrict the outside loan for the last issue of a serial. The restriction can apply to the last issue of a serial kept by the library, or the last issue of the current volume of a serial.

The restriction is switched on with a special parameter upon the library's request.

11. Loan restriction for material with the same COBISS.SI-ID in several departments at once

The library can restrict the loan of material with the same COBISS.SI-ID in another department for the member.

The restriction is switched on with a special parameter upon the library's request.

12. Renewing the loan period for any period of time

The loan period can also be renewed by entering the time period, e.g. 6 weeks. In order to do so, double-click on the loan period expiry date in the **Home library material** window, delete the date in that field and enter the time period. The loan period can be renewed for any number of days (*d*), weeks (*w*), months (*m*) or years (*y*) starting with the current date.

13. Renewing the reservation validity period

By clicking the **Renew** button, it was only possible to renew the loan period for material for outside loan (status *C* – *outside loan*) until now. From now on, it is also possible to renew the reservation validity period in the same way (material with status *R* – *reserved unavailable material*, *W* – *waiting on the shelf (reserved)* or *O* – *reserved available material*).

The option of renewing the reservation validity period is switched on with a special parameter upon the library's request.

14. Interdepartmental loan and return from department without computerised loan

A library can also record the interdepartmental loan or return of material that belongs to a department without computerised loan. In such a case, the transaction takes place in the host department. For this purpose, use the **Put on interdepartmental loan from department without computerised loan** method or the **Return interdepartmentally to department without computerised loan** method in the host department. The material you put on interdepartmental loan can then be lent to library members in the host department.

15. Test to see if SMS-notifications are received by the library member

A library can check for a member if it is possible to send SMS notifications to the number for SMS notifications, entered under "Mobile phone number". Sometimes members who used to have SMS notifications blocked are convinced that the receipt of SMS notifications is no longer blocked, but they still do not receive SMS notifications. By clicking **SMS test** in the **E-notification** window, a test message is sent to the number for SMS notifications. If the member confirms that he/she received this messages it means that messages are no longer blocked and he/she should be receiving SMS notifications as part of e-notifications. If the member does not receive the test SMS notification it means that commercial messages are still blocked, so he/she should contact the mobile provider to unblock messages.

The test SMS notification is sent free of charge.

16. General notifications

The functionality of sending general notifications was updated. From now one, it is possible to send general notifications only to those members you find and select in the

member search window first. Among the selected members, only those who are subscribed to this type of e-notification will receive the general e-notifications. The **General notification** window, which opens when you use the **Member / Send general notification** method, was also partially reorganised. When using this method, only those types of notifications will now be visible and confirmed by default that were specified by the library with the **Home library / Electronic notification** method under the type of notification *General notifications*. The window for text entry was enlarged. Libraries are advised to send and distribute general notifications from the COBISS3 software mainly with the purpose of informing their members about news or notifications being published on their websites. It is possible to include a link to a website to a general notification. The visibility (activity) of the link in the received e-mail depends on the settings in the e-mail viewing software of the library member, i.e. notification recipient.

17. Notification about outstanding debts

The library can automatically send e-notifications about outstanding debts of their member. If a library would like to enable its members to receive these notifications, it must use the **Home library / Electronic notification** method to enable the receipt of this type of notification. In order for a member to receive such a notification, this notification type must be selected in the e-notification data. A member who is subscribed to this type of notification will receive a notification about outstanding debts after a certain number of days since the date of the recorded debt (the default value is 3 days).

18. Member's lending form

The lending form for members was updated so that the material, for which the loan period was renewed at the member's last visit to the library, is displayed separately in the section *Loan period renewed*. The material, for which the loan period was renewed in the usual way (**Renew** button) or entered with a manual change of the due date or entry of period, for which the loan period was renewed, is taken into account. Also added to the lending form is the section *Ordered material*, where reserved material is displayed separately (the statuses *O – reserved available material*, *W – waiting on the shelf (reserved)* or *U – material reserved in reading room*).

19. Report LOAN-TR-04: List of cash register transactions

The report *LOAN-TR-04: List of cash register transactions* was added; it shows the list of cash register transactions that were entered by a member of the loan department for a specific library member or all members at the same time. The advantage of this report is that you can specify a precise query of specific cash register transactions for each username. The following input parameters can be used when creating the report: "Member ID", "Library department", "Transaction type", "Type of service/debts", "Entered", "Entered by", "Reason for deleting/writing off debts".

20. Loan statistics

The following changes were made to loan statistics:

- For the groups of statistics "Loan of material" (from *LOAN-STA-Mt01* to *LOAN-STA-Mt07*) and "Active members" (*LOAN-STA-Mb03* and *LOAN-STA-Mb06*), two new input parameters were included ("Transaction" and "Username"), which expand the possibilities of preparing different statistics of loan of material. For the statistics *LOAN-STA-T01* and *LOAN-STA-T02* only the new input parameter "Username" was included. For the input parameter "Transaction" all transactions that are taken into account as loan of material are set as default. For the input parameter "Username" the default value is *blank*, by default all transactions are taken into account that were carried out under all usernames. For the input parameter, a code list is available, where it is possible to select from non-personal usernames that can be selected when creating statistics for the loan of e-books (username *EbookService*), loan of material with technical equipment (username *knjigomat1*, *knjigomat2*, etc.; applicable to libraries with self-checkout), etc.
- Access to expanded username code list. For loan statistics, where the input parameter "Username" is available, the expanded username list (personal usernames are also visible) can only be used by authorised staff members, who hold the *RPT_USER – activation of expanded username code list* privilege in the COBISS3/Reports software module. The username code list can be expanded in the COBISS3/Loan software module by using the **Home library / Expand username code list for reports** method. When you start preparing loan statistics for a specific personal username, the expansion of the username code list must be turned off using the same method in order to disable access to the expanded username code list for other unauthorised staff members.
- In loan statistics, transactions with material in the reading room are now also included, if they were recorded by using the **Record transaction with material in reading room** method (**Field 996/997** class), for statistics of visits by members and transactions, the transactions of visits of members and non-members, recorded with the **Enter visit** method (**Member** class), were included.
- The following new statistics were added: *LOAN-STA-Mt08: Loan – by UDC (detailed)/language/active months*, *LOAN-STA-Mt09: Loan – by UDC (main)/intended purpose/language/active months*, *LOAN-STA-Mt10: Loan – by material ratio/member category*, *LOAN-STA-Mb07: Active members – by municipality/member category*, *LOAN-STA-Mb08: Visits by members – by municipality/member category*, *LOAN-STA-T03: Transaction – by municipality/member category*.