

The COBISS3 software Version V6.3-00, June 2015

Description of new features in the COBISS3/Loan software module

The following changes and updates were added to version 6.3-00 of the COBISS3/Loan software module:

1. Calculation of costs of overdue notices

Upon the library's request, a special parameter can be set so that when calculating the costs of overdue notices a previous overdue notice is replaced by a new, higher overdue notice costs (for example, the cost of the 2nd overdue notice is overwritten by the cost of the 3rd overdue notice).

2. Calculation of costs of fine

Upon the library's request, a special parameter can be set so that fine is calculated only for the days until the date of receipt of the 3rd overdue notice.

3. Overview of overdue notices

The **Deletion of individual overdue notices** method was renamed the **Overdue notices – overview** method. From now on, the method enables you only to overview overdue notices for the selected member.

4. Partial debts settlement

A library can enter a partial debt settlement if a member cannot settle the entire debt on that visit. In that case, enter the amount that a member will settle on that visit under »Amount due«. After the settlement is confirmed, the debt will be reduced by the settled amount, and the number of units will change accordingly. The rest of the unsettled debts will remain entered for the member.

5. Entering debts settlement for non-members

A library can enter debts settlement also when a payable service is performed for a person who is not a library member (e.g. photocopying). In the **Invoice** class, select the **Enter debts settlement for non-member** method. In contrast to entering debts for library members, debts must be settled immediately for the non-member. The amount

settled will be added to the total cash register balance and will appear on the report when you close out the cash register and on the *LOAN-CRO-01: List of invoices* report.

6. Debts settlement

In the **Debts settlement** window, the **Send** button is now active. This means that after you enter the debts settlement data, the invoice will be printed immediately and you will no longer need to click the **Send** button.

7. Price list validity in libraries with departments

In libraries with departments, the standard price list defined for the home library is valid, except in departments where a different price list is defined. From now on, you no longer need to enter the price list for each individual department. First, enter the price list that is valid for the home library, and after that, based on the home library price list, create a price list for the departments where the price list is different.

From now on, you no longer need to set up the parameter to create different price lists by departments.

8. Reservation of material in the Home library window

Until now, you could enter a reservation of material only if you first searched for the material and selected it in **Catalogue**. From now on, if you have a physical copy of the material in front of you, you can enter the reservation of material also by entering or reading the identification number of the copy in the **Home library material** window and clicking the **Reserve** button. According to the loan status, the corresponding reservation of material will be entered.

9. Creation of lending forms and invoices

Libraries that print lending forms and invoices for their members can create different lending forms and invoices according to their needs. They are taken into account when issuing a lending form for a member in the **Home library material** window and clicking the **Lending form** button or when issuing an invoice for a member in the **Entering and settling debts** window and clicking the **Settle debts** button. You can activate the creation of lending forms and invoices by using the **Home library / Create lending forms and invoices** method.

You can create several different lending forms and invoices, which can be activated by using a special method where necessary.

Lending forms and invoices can be issued in two different formats (narrow format and A4 format). They can be created also for individual library departments. If a library has no departments, create lending forms and invoices for the Home library.

From now on, lending forms can be sent also to a member's e-mail address, which can be activated by a special setting. You can issue a lending form simultaneously in the following two ways – by sending it to printer and to a member's e-mail address.

A new functionality of the lending form enables you to display only the selected material, material that was borrowed today and material that was borrowed in all departments. You can customize the lending form to display additional data on the material and to display unsettled debts.

You can customize an invoice so that a list of borrowed material for the member is displayed at the end of the invoice, and you can further define whether cash and change will be displayed.

From now on, a library can edit four types of data (department under library name, additional data under the member's name, note on the invoice, and additional data at the end of the lending form). When editing a lending form, you can use variables, which show the corresponding value on the lending form or invoice.

NOTE:

From now on, IZUM will sort all customized texts after the implementation of the new version of the COBISS3 software for libraries that had texts customized in the COBISS3/Reports software module under variable definitions (*Signature on lending form* and *Note on lending form*). IZUM will take into account the current settings (parameters) that in any way influence the display of data on a lending form or invoice (e.g. display of membership expiry data, display of the member's faculty, display of note on invoice, etc.) for individual libraries. New forms for these libraries will be entitled »Customized forms (IZUM)« and will be available for further customizing. Initially, all other libraries will have only the default forms.

10. Note indicator – CIR

In the **Home library material** window, a new note indicator CIR was added, which will be displayed when material is entered for a member in at least one of the library departments that is different from the login department.

11. Refreshing data

For members (and departments for interlibrary loan) for whom a significant number of copies is entered, refreshing data simultaneously when carrying out individual transactions in the **Home library material** environment can take longer. For this reason, a library that has such members or departments can decide to turn on the parameter that enables refreshing the data in this window manually. In this way, procedures for these members can be performed more quickly.

12. Reports for loan purposes

The following reports for loan purposes were added:

- *LOAN-Mb-08: List of members with debts*

This is a report of the list of members with unsettled debts that were entered within a certain period. The start and end of the period is defined when creating the report. In libraries with departments, you can create a list for each individual department by entering the “Library department” parameter. If the parameter is not defined, a list will be prepared for all departments.

- *LOAN-EXP-03: List of uncollected debts*

By creating the report, data for all entered material for which the last overdue notice was entered is created. The report is created in a form to export data. The file is saved in a text form (txt) so that it is ready for further data processing in other programmes (e.g. Excel). The report includes data that refer to entered copies under the last overdue notice, data on the members who received the last overdue notice and data on entered debts or current fine for the material for which the last overdue notice was entered (situation on the day of creating the report).

- *LOAN-CRO-02: List of invoices incl. VAT*

This is a report of the list of all transactions of settling debts (cash and non-cash) in the selected period including data on VAT.

- *LOAN-CRO-03: Summary of list of invoices incl. VAT*

This is a report of the list of all transactions of settling debts (cash and non-cash) including data on VAT by individual days in the selected period.

13. Loan statistics

The following statistics are added:

- *LOAN-STA-Mt11: Loan – by mobile library stops/member category/active months;*
- *LOAN-STA-Mb09: Active members – by mobile library stops/member category;*
- *LOAN-STA-Mb10: Visits by members – by mobile library stops/member category.*