The COBISS3 software
Version V6.4-00, December 2015

Description of new features in the COBISS3/Loan software module

The following changes and updates were added to version 6.4-00 of the COBISS3/Loan software module:

1. Renewing/changing the due date in all departments simultaneously

Upon the library request, a special parameter can be set so that, when you select the **Select all** button to renew or change the due date for all material, the due date of the material that is entered for the member in other library departments will be renewed or changed as well. After renewing or changing the due date, the same limitations and conditions that apply when the due date is changed or renewed in each department separately will be taken into account.

2. Reservation processing by material sublocation

A list of reservations can now be prepared also by material sublocation. This type of processing is appropriate mostly for libraries where loan is not organized by departments and material is placed in different locations, or libraries where material within the same department is placed in different locations.

In a library, a code list for reservation processing is prepared to define the material of which sublocations will be taken into account when creating a list of reservations. When you select the reservation processing method, based on the code list of reservation processing, the place of reservations for which the list will be prepared must be selected.

If a library decides on this type of reservation processing, all library or individual department sublocations must be included in the code list (if loan is organized by departments). When processing the reservation, only the sublocations that were included in the code list will be taken into account.

3. Reserving material for department

Material can now be reserved also for a department (applies to libraries with departments). Reservation for department is entered in the **Home library material** window in the same way as for the member. Reservation of available (status *O*) or unavailable (status *R*)

material can be entered for a department, whereas a reservation of material for reading room use (status *U*) is not possible. When returning reserved material, an e-notification on the received reservation to the e-mail address that was entered for the department can be sent.

4. Additional warning for procedures with material on interdepartmental loan

If material is reserved in the parent department, a note on the reservation in the parent department will be displayed also in the host department when you run procedures involving loan, reservation and return of material.
When reserving material in the parent department, a note will be displayed if material is on interdepartmental loan.

5. Returning material without selecting a member

Returning material without selecting a member by using the **Return, delete** method in the **Unavailable material** class, is now quicker as the **Home library material** window will close when you confirm the return. Until now, you needed to close the window by pressing the <Esc> button or clicking the button for closing the window.

6. Entering debts for returning material in another department automatically

A library with departments can charge the costs of returning the material to another library department to its members. The debt will be automatically entered if the price for the return to another department is entered in the price list (*VRA* item on the **Services/debts – other (I)** tab) and the value *automatically* is selected under »Calculation method«.

7. New transaction *32 – entering payment*

Until now, debts settlement for the member was entered as the transaction *2 – change of member data* (the amount for unsettled debts was changed). From now on, debts settlement is entered as an individual transaction, which can be seen in reports (e.g. *LOAN-TR-01*: *Transaction for member – membership card No.*), and at the same time it is taken into account for recording visits by members (statistics of visits).

8. Outstanding debts in the Home library material

If the amount of outstanding debts is greater than 0, it will be displayed in red in the **Home library material** window.

9. Member details in the Home library window

If a parameter is set in a library to display data (e.g. class), which is not entered for the member, after the name and surname of the member in the **Home library** window, the member category will be displayed.
Example: in school libraries, class and class teacher will be displayed for pupils; for employees, the member category will be displayed.

10. Changing class/grade

In school libraries, the **Member/Change class/grade** method can be used to batch change classes at the beginning of the school year. First, a table with rules for changing classes must be prepared. A table with rules for batch changing classes for members can be prepared in several steps and saved during the process. For this purpose, in the **Table of classes (local code list Class, class teacher (CODE 310)**) window, the **Save** button was added. If you continue the procedure by clicking **Save** instead of **Use**, when you use the **Member/Change class/grade** method, you can choose if you wish to use the prepared table or you will start from the beginning. If you cancel the use of the already prepared table, the table will be deleted. If you had changed the local code list **Class, class teacher (CODE 310)** since you prepared the table, a note will be displayed and you can change the local code list in accordance with the table before you start the procedure.

11. Arrangement of issues in the Select issues window

In the **Select issues** window, the order of serial issues is changed so that the newest issue is at the top. The **Select issue** window will open when you enter only the accession number without the issue designation while borrowing, returning or reserving the material.

12. New reports

The following two reports were added:

- **LOAN-TR-05: Members with highest number of loans**
  In the COBISS3/Reports software module, a new report, which includes a list of members with the most outside loans within a specific period (number of loan renewals is not taken into account!) can be prepared. Fifty members with the most loans will be included in the list. When creating a report, the start and end of the period must be defined. The following input parameters can also be defined: member category, type of material and library department.

- **LOAN-ON-03: Statistics of overdue notices**
  In the COBISS3/Reports software module, in the Overdue notices group, you can create a report that includes the statistics of created overdue notices. A report for the selected period will display overdue notices by days of creation of overdue notices. For an individual overdue notice (1st, 2nd, 3rd, and 4th overdue notice), a

number of members that received an overdue notice and a number of items for which an overdue notice was received will be displayed. Under the "Overdue notices created on" parameter, a specific date or period of creating overdue notices can be entered. In a library with departments, by entering the "Library department" parameter, a report will be created for an individual department. If the parameter is not defined, the report will be created for all departments, and the data will be displayed for an individual department.

13. Loan statistics

From now on, for a better visibility, loan statistics will be sorted in new groups (folders). Designations of existing loan groups form the LOAN-STA-C…, which are reorganized into two groups, i.e. the group of statistics *Visit* (statistics LOAN-STA-Mb…) and the group of statistics *Active members* (statistics LOAN-STA-A…), will be changed.

The new arrangement of loan statistics will be as follows:

Loan of material
Transactions
Visit
   Visit by transactions
Active members

The following new statistics were added:

- *LOAN-STA-Mt12: Loan – by financier/material/member category*

- *LOAN-STA-V07: Visits by members – by hours/days*

- *LOAN-STA-A05: Active members – by member category (after the year of transition to COBISS3/Loan)*

- *LOAN-STA-A06: Active members – by member category (for the year of transition to COBISS3/Loan)*

- *LOAN-STA-VT01: Visits by members – by member category/months (transactions)*

- *LOAN-STA-VT02: Visits by members – by member category/days (transactions)*

- *LOAN-STA-VT03: Visits by members – by class/months (transactions)*

- *LOAN-STA-VT04: Visits by members – by class/days (transactions)*

- *LOAN-STA-VT05: Visits by members – by municipality/member category (transactions)*

- *LOAN-STA-VT06: Visits by members – by mobile library stops/member category (transactions)*

- *LOAN-STA-VT07: Visits by members – by hours/days (transaction)*

In loan statistics, in the subgroup of statistics **Visits by transactions**, you can create statistics of visits by members for an individual transaction or a selected group of transactions. On the report parameter define only those transactions that you wish to take into account when creating statistics of visits by members by transactions. New statistics of visits by members by transactions have the input parameter "Username", which enables you to create the statistics for the selected username or a group of usernames; for this reason, in order to see the entire code list of usernames the **Home library / Expand username code list for reports** method must be used.

For libraries that transitioned from the COBISS2/loan software module to the COBISS3/Loan software module, two new statistics were prepared. The statistics enable you to prepare data on active members for the transition period, which means for the calendar year when the library transitioned to COBISS3/Loan. Calculation of data on active members from both software modules could be problematic; therefore, the newly created statistics enable you to see the number of active members also for the transition period in the year of transition. The statistics *LOAN-STA-A05: Active members – by member category (after the year of transition to COBISS3/Loan)* can be prepared after the new year according to the year of transition and will be created only for the entire calendar year in which a library carried out the transition. Libraries can use the statistics *LOAN-STA-A06: Active members – by member category (for the year of transition to COBISS3/Loan)* for monitoring the number of active members but only from the beginning of the new calendar year until the creation of the report. For this reason, in order to ensure the accuracy of data, a library must strictly follow the instructions for the creation of statistics in the COBISS3/Loan software manual.