The COBISS3 software
Version V6.1-00, October 2014

Description of new features in the COBISS3/Loan software module

The following changes and updates were added to version 6.1-00 of the COBISS3/Loan software module:

1. **Registering a new member by downloading data from the reference students database**

   The library can set up a special parameter for downloading member details from the reference students database. In this case, you can search student records in the window for defining the membership card number. You can search by user number, membership card number, name and surname. Once you select a student record, the data on the member is copied to the member details. Check the data and update it if necessary.

2. **Creating a reference students database and updating data on entered members – students with data from the reference database**

   A reference database can be prepared in two ways:

   - before preparing a new reference database, delete the data from the existing reference database – by doing so, only new data on students will be in the reference database
   - add new data on students (e.g. first year students) to the existing data in the reference database

   The reference database is the basis for registering new members in a library. If the member you will enter is studying at a higher education institution, you can transfer some of the data from the reference students database.

   The reference database is also the basis for updating data on already registered students in the library members' database. When updating data, data on members – students is overwritten with the new data from the reference database.

   One reference database can be used by one or several libraries (e.g. faculty libraries under one university). When it is used by several libraries, the reference database is installed in the local database of the library that maintains it. The other libraries can use the data from the reference database only for registering new members and updating data on members – students. The settings in the library that maintains the reference students database and in libraries that use it are managed by special parameters in the configuration file.

To preform procedures related to the reference students database, the privilege *LOAN_STUD – maintenance of reference students database* is required.

3. New report LOAN-Mb-07: Statistics of updating member details – students

A new report was added for displaying statistics on updating member details with data from the reference students database. In the report, the summary data about the changes performed for the members is displayed, followed by lists of members by type of change.

4. Creating overdue notice forms

Libraries that use the procedure for creating overdue notices can create different types of overdue notice forms according to their needs that are taken into account when creating overdue notices. To activate the creation of overdue notice forms, use the **Overdue notices / Create overdue notice forms** method. The important new feature is that a library can create forms that are specific for each overdue notice and department (if the library has departments). Several versions of overdue notice forms can be prepared in advance, both those that are used for creating general overdue notices as well as those where the text and/or data included is different as they are used for different occasions (e.g. modified forms for overdue notices that are used for public holidays, e.g. National Culture Day, etc.). It is also possible to create different versions of all overdue notice forms in five language versions. It is up to each library to decide which language is defined in each language version. For example: the first language version can be in English, the second in German, etc. The order of the individual languages in the language versions is not strictly defined.

Up until now, the library information centre, in accordance with the loan minutes or upon the library's request, set up the print format (A4 or three layer carbon-copy envelope) and the position of the user's address on the overdue notice (left or right on A4). From now on, when creating overdue notice forms, the library itself can define both the print format and the position of the user's address on overdue notices in A4 format.

Libraries that until now had their texts for creating overdue notices defined in the user variable definitions (*Postage paid (overdue notice)*, *Introductory text (overdue notice)*, *Conclusion text (overdue notice)* must now, after installing the new version of the COBISS3 software, edit all customised texts by using the new **Overdue notices / Create overdue notice forms** method, otherwise the created overdue notices will be prepared based on the default texts in their domestic language.

5. New attribute in the Member editor

In the general member data in the **Member** editor, the new attribute "Language of overdue notices" was added where you can define one of the language versions for the member to receive created overdue notices in a specific language. The default value for the "Language of overdue notices" attribute is *domestic language*, so this attribute only has to be changed if the library member (e.g. a foreigner) wishes to receive overdue notices in another language. The precondition for creating an overdue notice in another language is that the texts are prepared in the required language version (up to five

language versions); otherwise the overdue notice for the member is created in the default (domestic) language.

6. Recording the loan of sets

Procedures for recording the loan of sets are now enabled.

Libraries can make up a set from several items if they wish for all the items of the set to be put on loan, returned, renewed or reserved as a whole and under the same conditions. Within the set, a leading item must be defined, which defines common characteristics of the whole set. The procedure is described in the *COBISS3/Holdings* User Manual, see chapter 6.*10 Making up a set*.

Loan

Items of the set can only be put on loan as a whole. Activate outside loan (**Lend** button) for the selected member and use the barcode reader to scan any item of the set. Lending a set by selecting it from the catalogue is not possible because the set must be kept whole.

In a separate window, a list of all items of the set will be displayed. In order to put the set on loan, all other items of the set must be scanned as well. If a loan fee or a wear and tear fee is defined for the set, it is only recorded once for the entire set under the conditions that apply to the leading item of the set. If the leading item has restricted availability, you will receive an automatic notification. It is up to you to decide whether you wish to put the set on loan despite the restriction. When considering maximum items on loan, a set is considered as one item. On the lending form, items of the set are displayed so that the leading item is on the top, followed by other items of the set.

Returning a set

When returning a set, the same rule applies; all items from the set must be returned as a whole. When you scan one of the items of the set when returning it, a list of all items within the set will be displayed. You have to scan each item individually. If you charge a fine when returning the set, the fine is calculated under the same conditions that apply to the leading item of the set.

If the set is reserved, it is allocated to the first member from the list of reservations. A notification about the received reserved set (if the member is subscribed to these notifications) is only sent once for all items of the set as a whole, and only one form with data on the received set is printed. If the library charges for notifications about received reserved material, the costs are only charged once for the leading item of the set.

It is also possible to return an incomplete set if a member loses one item, leaves it at home, or returns a damaged item. Procedures to be performed in such cases are described in the COBISS3/Loan User Manual, see chapter *4.16.2.1 Return of an incomplete set*.

Loan renewal for a set

When renewing loan period, the renewal period and any restrictions that apply to the leading item of the set are taken into account. To renew the loan period of a set, select any item of the set in the **Home library material** window and click the **Renew** button. The new loan expiry data applies to all items of the set. The same applies when renewing the loan period manually, i.e. when you define the due date yourself.

Reserving a set

When reserving a set, the reservation validity period and any restrictions that apply to the leading item of the set are taken into account.

To reserve an available set, select any item from the set in the **Catalogue** window. Reservation of an unavailable set is recorded in the catalogue by selecting an item from the set to reserve it, whereas a reservation by selecting the bibliographic description is not possible. Reservation of an unavailable set is linked to the accession number of the leading item of the set and is recorded for the member with a reservation identification number in the following form: <COBISS.SI-ID, accession number of leading item>.

As for other available reserved material, you can use the **Unavailable material / Process reservations** method to check for any new reservations of available sets. Reservations are displayed for each item of the set separately, but the accession numbers of all items from the set are displayed together with the accession number of each individual item of the set.

Remove reserved sets from the shelf and use the **Unavailable material / Prepare reserved material for collection** method to prepare them for collection. Scan the ID number of any item of the set and then scan all remaining items of the set in the window with a list of all items of the set.

During the process of batch deletion of expired reservations, reservations of a set as a whole are also deleted.

Sets in the catalogue

Items of the set, taken from the same bibliographic record, are displayed together in the catalogue. For each set, the set number and the set item number are displayed. If items of the set are taken from different bibliographic records, they are not displayed together in the catalogue; only the set item you were searching for is displayed.

In the catalogue, a set can only be reserved, it cannot be put on loan.

Returning a set with restriction

If you wish to examine items of the set before returning them (e.g. toys), record the return with restriction, which means that the set is still recorded for the member (status *B*). To record the return of a set with restriction, scan the ID number of any item of the set and

click the **Retain** button. After that, scan the remaining items of the set. Once you finish examining the set, return the material by using the **Return** button.

Recording the loss of a set

If a member reports a loss of all items of the set and you would like to record that but keep the material in the member's records, record the loss of the whole set. In the **Home library material** window, scan any item of the set and click the **Return** button, after that, select all items in the window with a list of set items and select the value *lost (status L in loan)* from the drop-down list. The status of each item of the set is changed to *L – lost* for the member.

If a member finds the material at a later point, record the return of all items of the set with the **Return** method.

If a member does not return the material, select the status *8 – lost (holdings)* from the drop-down list in the **Set** window so that items of the set are no longer recorded for the member. By doing so, the value *8 – lost* is automatically entered to subfield 996q for all lost items, and restricted availability is set for the leading item (*0d* in subfield 996u), which automatically disables the loan of the set.

Insight into the library material status

When using the **View** method for material that is part of the set, the number of the set and the number of the set item from subfield 996c are displayed after the accession number of an individual item of the set in the **Insight into the library material status** window.

Overdue notices

In the procedure of creating overdue notices, by using the **Overdue notices / Create overdue notices** method, the time parameters that apply to the leading item of the set are taken into account. The overdue notice is recorded for each item of the set individually. In libraries where the cost of overdue notices is calculated by items, the cost is only charged for the leading item of the set. In the overdue notice report, each item of the set is displayed together with the item number and designation of the part of the set.

7. Returning material in any department

A library with departments may allow their members to return the borrowed material in any library department.

The return of material in a department where the material was not borrowed from is only possible in the **Home library material** window for the selected member by entering the item identification number (accession number or loan number). Material that was returned in a different department than where it was borrowed from is recorded as retained (status *B*) in the records of the department where it was returned to. A form is printed with data on the material (if the library has set up the parameter for printing forms

on received reservations). Once the material is delivered to the department where it was borrowed from, it has to be deleted from the material records of the department where it was returned to.

8. Returning material with restriction

If you wish to examine the material upon return for any claims (e.g. the material is damaged or some parts are missing in the toy sets, etc.), return it with restriction by using the **Retain** method in the **Home library material** window. Material returned with restriction is still recorded for the member and has the status *B – retained*. It is possible to reserve the material but it is not available for loan. When you finish the examination, delete the material from the member's records (**Return** method).

9. Recording the loss of material

Use this method when you wish to record the loss of material but would like to keep it in the member's records until you decide about the form of compensation for the loss.

In the **Home library material** window, find the item and double-click the loan status (column 1). Then select the value *LOST* in the **Status selection** window. The status of the item is changed to *L - lost* and the number on the counter of lost items for the member increases.

If the member finds the item after a set time and returns it to the library, free the member from debts by first lending and then returning the item.

If the member does not find and return the item after a set time, free the member from debts finally by deleting the lost item from his/her records. You can also disable the loan of the item by confirming the automatic entry to the holdings data. Enter the status *8 – lost* to subfield 996q and the value *0d* into subfield 996u to restrict the availability.

10. Additional condition for deleting member details

When deleting member details it is now also checked if a pending interlibrary loan request or material from pending requests is recorded for the member. In such a case, member data cannot be deleted. This additional condition is taken into account when deleting member details individually (**Member / Delete member details** method) and when batch deleting data on inactive members (the methods **Member / Batch deletion of all inactive members** and **Member / Batch deletion of selected inactive members**).

11. Turning e-notifications for members on and off

From now on, libraries do no longer have to inform IZUM that they wish to send out automatic e-notifications (*notif. about a loan period exp. date, notif. about forth. overdue notice, notif. about membership expiry*), because they can independently and without IZUM's intervention turn on (activate) and turn off (deactivate) individual types of e-notifications. Once a certain type of e-notification is (de)activated, the change comes into effect the following day.

12. Loan period expiry date in textbook fund departments

In school libraries where loan is organised by departments, a special loan period expiry date can be set up in the department operating as the textbook fund. This date is taken into account when lending material for all types of material until the library deletes or changes it. The loan period expiry date is set up on the workspace by using the **Department / Loan period expiry date** method.

13. Transferring library material between members

The library can set up a special parameter that enables transferring material on loan from one member to another. When lending the material to another member, the return of the material is carried out automatically for the first member. This is a standard procedure in school libraries.

14. Mobile library loan

The COBISS3/Loan software now enables automated loan procedures in the mobile library department in an area of the mobile library route, where the quality of signal allows procedures to be performed effectively in the COBISS3 software. The COBISS3/Loan software can only be accessed online.

As a rule, loan in a mobile library is carried out in the same way as in libraries, only a few special settings are required: the number of mobile libraries must be entered under data of the mobile library department; according to the operation of the mobile library, the list of mobile library stops must be entered to the local code list of mobile library stops; the calendar and time parameters must be set. Before the mobile library starts operating, a mobile stop must always be selected. Due to limited space, the mobile library holds only part of the mobile library material. For the material availability to be shown in the catalogue, the transfer of material must be entered by using the **Department / Transfer material to and from mobile library** method under the mobile library department. Material that was not delivered to the mobile library cannot be put on loan in the mobile library. Such material can only be reserved.

When procedures cannot be performed effectively due to poor signal, loan, return and renewal procedures can be entered in the **Offline COBISS/Mobile library loan** application. Before you start working in COBISS3/Loan, the application must be installed on the computer that is used in the mobile library (new method **Department / Install offline application in mobile library**). Transactions that were entered in the **Offline COBISS/Mobile library loan** application should be transferred to the COBISS3/Loan software module once you get to the mobile library stop where online entry of loan procedures is again available (new method **Department / Transfer transactions form offline application in mobile library**). You can also view the transfer of transactions by using the new **Department / View messages on the transfer of offline transactions** method.

Related to the mobile library loan, two new reports were added to the COBISS3/Reports software module: **LOAN-Mt-03: Mobile library material** and **LOAN-Mt-04: Unavailable mobile library material.**

15. RFID self-checkout and RFID reader at the lending desk

In combination with the COBISS3/Loan software, libraries can now use the RFID self-checkout, devices for self-service check-in and check-out, and the RFID reader at the lending desk. It is important that the equipment supplier provides appropriate communication with the COBISS3/Loan software in accordance with the SIP2 standard. The precondition for the complete functionality of the RFID reader at the lending desk in combination with the COBISS3/Loan software is that the equipment supplier integrates the software interface, which is part of the COBISS software. The specification for the software interface is available at IZUM. If the equipment supplier does not meet these conditions, appropriate functionalities in the COBISS3/Loan software cannot be guaranteed.