COBISS®

Co-operative Online Bibliographic System & Services

COBISS3/Loan

V6.2-00

User Manual

Institute of Information Science, Maribor, Slovenia

IZUM®

CONTENTS

1   INTRODUCTION

The following instructions describe the procedures used to edit data on library members and the process of lending material in the library, such as:

- setting up loan parameters
- adding members
- editing member details
- deleting member details
- changing the membership card number
- finding members
- changing class or grade
- outside or reading room loan
- return of material
- loan period renewal
- changing the due date
- reservations of available and unavailable material
- entering notes on the material
- return of material
- routing lists for serials
- interdepartamental loan
- managing a price list
- entering and settling debts
- creating overdue notices
- creating overdue notice forms
- recording the loss of material
- returning material with restriction
- returning material in any library department
- loan procedures in the mobile library department
- transferring data from the reference students database

For libraries, which have been using the COBISS2/Loan software module, the following data will be transferred from the COBISS2 environment upon installation of the COBISS3/Loan software module:

- data on members from member records

Only the data, which is also a part of the attributes in the **Member** class, will be transferred.

- data on entered material (status *C – outside loan, D – on interdepartmental loan, K – routing, S – on loan (reading room), R – reserved unavailable material, O – reserved available material, W – waiting on the shelf (reserved)), U – reserved in reading room, L – lost and B – retained*)

Data on transactions from the archives and parameter settings in the library are not transferred.

In the current version, the details about other recorded material for the member are not yet being transferred (the material statuses *L – lost, B – retained*). This also applies to the data on transactions from the archives and to the parameter settings in the library.

- data on entered debts

Only the data on outstanding debts will be transferred. Data on settled debts and transactions will not be transferred.

- data on entered overdue notices

Data on current overdue notices will be transferred for the member. Only data on received overdue notice will be transferred for the already settled overdue notices, but not the data on material for which the overdue notice has been issued as the member has already returned the material.

- price list

Data for all items that were entered in the price list in the COBISS2/Loan, except for the item *MKI interlibrary loan*, will be transferred. The service price for interlibrary loan is entered differently in COBISS3 than in COBISS2 (see COBISS3/Interlibrary Loan User Manual, chapter *11.3*). For individual items in the price list, the following data will be transferred: service/debts code, description, price per unit, calculation method and tax group.

Before starting to use the COBISS3/Loan software module, the library must:

- add or edit the home library data; the data is transferred from the COLIB database upon installation of COBISS3 software and is saved to the home library database and the partner database. The entry of Home library data is described in the *COBISS3/Application Administration* User Manual (see chapter *2.1*).

- set up time parameters for loan

- if necessary, add non-work days to the calendar

- if necessary, edit the settings for loan type for copies with restricted availability in the pq table (settings are edited by the national COBISS centre upon the library's written request)

- if necessary, specify the price list

- if necessary, edit overdue notice forms

Most loan-related procedures (registering a new member, outside loan, reading room loan, return of material, etc.) are performed in the **Member** class. You can also find or return borrowed material (except for material borrowed through interlibrary loan) within the **Unavailable material** class. Some loan parameters, e.g. time parameters, are set up in the **Home library** class. Instructions for working with classes common with other software modules (e.g. **Partner**, **Material**, **Field 996/997**, **Home library**) are described in the respective user manuals. The **Material** class can give you insight in the status of the material on loan including the information about who borrowed the material. It is also possible to enter a note on the individual item for the **Field 996/997** object. Price lists can be managed in the **Price list** class, while searching for invoices, entered members' debts and cash register transactions can be performed in the respective classes in the **Entering and settling debts** folder. Cash register can be closed in the **Cash register balance** class.

2.4   ELECTRONIC NOTIFICATION

Parameters for electronic notification on the library level are maintained by the **Home library / Electronic notification** method. By setting up these parameters, the library specifies which types and methods of notification (e-mail or SMS or both) will be available to its members. Library members can subscribe only to those types of electronic notifications which are available in the library.

The **E-notification** window will open, where you can tick the checkbox under individual types of notifications to select the method of notification that will be available to your members.

> Note:
>
> *To turn on automatic e-notifications (*notif. about the loan period expiry date, notif. about forth. overdue notice, notif. about membership expiry)*, no special written request has to be sent to IZUM; the service can be turned on and off by the library.*
>
> *If a library does not want to send a particular type of notifications to its members anymore, a tick must be deleted in the check-box for this type of notifications. The change will become effective on the following day.*

2.4.1   Notification types

You can choose between e-mail notifications, push notifications, or SMS notifications:

- Notification about reservation expiry

  A member subscribed to this type of notification will receive a notification if a copy which was reserved or waiting for the member (statuses *O, W* or *R*) is deleted from the member's list of recorded material and if the reservation validity period expired. The event can be activated individually if the person in charge of loan deletes such a copy from the member's records or as a batch if deletion of expired reservation is performed (see chapter *4.13.4*).

- Notification about received reserved material

  A member subscribed to this type of notification will receive a notification if the material that was reserved by the member was returned to the library or if the available reserved material is ready for collection (status *W*). If the member is the first on the list of reservations, he/she will receive a notification when another member returns the material at the lending desk. The member can receive a notification even if the reservation whose validity expired is deleted, or if the member who was before him/her on the list of reservations

cancelled the reservation (statuses *O* and *W*).

- Notification about loan expiry date

  A member subscribed to this type of notification will receive a notification when a certain number of days is left before the loan period expires (the default values is 3 days for loan and 5 days for interlibrary loan) for any copy on outside loan or borrowed through interlibrary loan. The member will receive the notification only once for each item. The notifications are sent out automatically once a day in a batch of notifications.

- Notification about a forthcoming overdue notice

  A member subscribed to this type of notification will receive a notification when the loan validity period expires for any copy on loan and when a certain number of days is left before the overdue notice will be sent out (e.g. 3 days). The member will receive as many notifications about a forthcoming overdue notice for each copy of material as are set by the library (1st overdue notice, 2nd overdue notice, 3rd overdue notice and 4th overdue notice), but no more than four. The notifications are sent out automatically once a day in a batch of notifications.

- Notification about membership expiry

  A member subscribed to this type of material will receive a notification that his/her membership will expire soon (e.g. in a week). A member will receive the notification about the membership expiry only once when a specified number of days is left before the membership expires. The notifications are sent out automatically once a day in a batch of notifications.

- General notifications

  A member subscribed to this type of notification will receive general notifications from the library (e.g. changes in the opening hours, etc.). SMS notifications of this type are free of charge for the member.

- Notification about outstanding debts

  A member subscribed to this type of notification will receive a notification about outstanding debts when the specified number of days exceeds the date when the debt was entered (the default value is 3 days). The notifications are sent our automatically once a day in a batch of notifications.

Note:

To ensure that the member knows from which library the notification was sent when he/she receives an SMS notification, the library must define the Abbreviated library name or lib. dpt. name *local code list (CODE 316). At the beginning of an SMS notification, a library or department name is displayed if it is entered in the local code list. A library acronym represents the code in the local code list for libraries without departments (e.g. FFLJ), while the abbreviated library name represents the code resolution. In libraries with*

> *departments, a two-digit department ID must be added to the acronym (e.g. SIKMB01). Abbreviated library name must not exceed 30 characters.*

Note:

You can change the text for e-mail notifications according to your needs. If you wish to do that, copy the appropriate system variable to user variables and change the text there.

2.4.2   Creating and sending general notifications

General notifications can be created and sent as follows:

Procedure

1. First select the **Member** class and then the **Class / Send general notification** method.

   The **General notification** window will open, where you can specify:

   - contents of notification

     By clicking the **Enter text** button, a new window will open, where you can enter a notification text or transfer (copy) it from some other document if you saved sample texts to your workspace. If you wish to enter an SMS-notification, the text should not exceed 155 characters.

   - type of notification

     Under the selected methods of notification, the methods of notification that a library set under *General notifications* by using the **Home library / Electronic notification** method are displayed and set as default. If a library does not wish to send a general notification with default methods of notification, a tick must be removed from the relevant check-box.

2. To confirm your entry in the window, click the **OK** button.

3. In the **General notification** window, click the **OK** button again.

   A search window for members will open, where, based on any criteria you enter, you can search for a member, several members or all members (e.g. you wish to send a general notification only to a certain member category). In the search window, the button **Select all** is available, which enables you to confirm the selection of all found members or all library members that you found by using the **Find all** button.

   If you are sending a notification by e-mail, the **Overview and sending of created report** window will open, where you can preview the created notification and then send it.

   If you are sending an SMS notification, it will be sent immediately.

Note:

*The notifications sent are stored in the **Notification** class, where you can find them, view them, and send them again if necessary.*

3   MEMBERS

For loan purposes, libraries keep a record of their library members. A special database is used to enter data on new library members and edit the data on the existing ones.

This chapter describes the procedure of registering new library members, editing and deleting data on members, printing labels for library membership cards, changing the library membership card number (when issuing a new card), searching for members and entering a visit when the visit is not recorded otherwise (e.g. when a member gets access to the internet).

To enter member details, use the **Member** editor. Some data on members is mandatory (e.g. "First name", "Surname", "Category", link to "Superior partner" for members – legal entities, etc.). Other non-mandatory data is entered depending on the statistical reports you wish to prepare.

When entering data, the local code lists (e.g. code list of departments of employment) and the global code list (e.g. code lists of post codes and cities) are also used.

The local code lists are maintained in the local databases of libraries. The process of updating local code lists is described in the *COBISS3 Basic Guidelines User Manual, chapter 4.7*.

Subchapters:

- Registering a new member
- Editing data
- Deleting member details
- Printing a label for the membership card
- Changing the membership card number
- Finding a member
- Changing class or grade
- Batch deletion of inactive members
- Entering a visit

Note:

When entering data for e-notification, a library member should be warned that he/she will receive SMS notifications only if the service of sending commercial text messages is provided by their mobile provider and if the service was not cancelled by the member.

Options

You 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 the message, it means that messages are no longer blocked and he/she should be receiving SMS 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.

3.1.2.1.3   Entering alternative or invalid identification numbers

To enter an alternative identification number, click the **Alternative ident. numbers** tab, and then click the **New object** button. A new window will open, where you can enter the following:

- Under "Alternative number type", select the alternative number type from the drop-down list. The data is mandatory.

- Under "Alternative number", type in the alternative membership number, or enter it by using a reader, which library members can use for identification when visiting a library. When entering alternative numbers, the program will automatically check for duplicates (whether another member has the same value for the same type of alternative number); several identical values of different types of alternative numbers and several alternative numbers of the same type can be entered for one member.

Invalid numbers are entered automatically when you use the **Member / Change of membership card number** method, when a library member loses his/her membership card. To view these numbers in the member details editor, click the **Invalid numbers** tab, select the invalid number in the window, and click the **Show** button.

Tip:

The membership card number of a deleted member or a deleted alternative number, which was saved to invalid numbers, can become available by finding

the invalid number and deleting it by using the **Delete invalid number** object method.

3.1.2.1.4 Entering the COBISS/OPAC password

Enter the authorisation password in online COBISS/OPAC in a special window that will open once you click the **Password** button. A series of asterisks will appear while entering the password. If the member forgets the password, a new one must be defined.

3.1.2.2 Entering data on schooling and employment

By clicking the **Schooling, employment** tab, you will open a window where you can enter the data on schooling or employment of the library member, if required.

Procedure

1. Select the type of school from the drop-down list.

   At library's special request a default type of school can be defined with a special parameter.

> *Note:*
>
> *If your library falls within eVŠ (Evidential and analytic information system for higher education in the Republic of Slovenia), select only type of school and grade in the Schooling, employment tab; enter other data on schooling into a special window that will open when you click the **eVŠ** button (see chapter* 3.1.2.2.1*).*

2. Under "Name of school", type in the school code or select it from the code list. Depending on the type of school you selected, you can search the code list of primary and secondary-schools or in the code list of universities.

   At library's request of the library, a default school name can be defined with a special parameter.

3. Under "Class/grade", enter the class or find it in the code list, which opens depending on the selected type of school, and transfer it.

4. Under "Course of study", enter the course of study or the training programme or find it in the code list and transfer it. You have to create the code list of courses of study yourself (local code list *Study programme (CODE 313)*), while the code list of universities is common to all the libraries.

5. Under "University", enter the university code or find and transfer it from the university local code list.

6. Under "Company of employment", enter the name of the institution in which the library member is employed, or find it and transfer it from the code list you created (local code list *Institutions, companies (CODE 303)*).

> Note:
>
> *If you entered the member's business address, it is recommended to enter the data on employment as well.*

7. Under "Department of employment", enter the department in which the library member is employed, or find it and transfer it from the code list you created (local code list *Department of employment (CODE 306)*).

3.1.2.2.1   Entering data on schooling in the eVŠ system

Libraries of the universities in the eVŠ system (Evidential and analytic information system for higher education in the Republic of Slovenia) can enter the eVŠ data by a special parameter in the configuration file. In these libraries, the **eVŠ** button is added in the **Member** editor.

By clicking the button, a window will open where you can specify data on the university, study programme, study programme B and mode of study by selecting appropriate values from the drop-down lists. The study programme drop-down lists will open according to the selected university. If you change the university, the selected values under both study programmes will be deleted.

3.1.2.3   Entering membership data

By clicking the **Membership** tab, a window will open containing the data related to the library membership. Most of the data will be entered automatically.

Automatic control of membership validity is activated upon the library's request with a special parameter. In this case, a warning message will be displayed when registering a new member or if a member whose membership expired visits the library; at the same time it is possible to record membership validity automatically. If you charge membership fee in the library, you must enter the price for membership fee and admission fee (see chapter *7.1* and *7.2.2.1*).

Procedure

1. Under "Library code", the library code is entered automatically depending on the parent library. The data cannot be changed.

2. Under "Department", the department is entered automatically depending on the department in which you are signed in; the data is only entered for those libraries, which have loan facilities available in several departments. The data cannot be changed.

3. Under "Mobile library stop", the mobile library stop where you are logged in when entering loan procedures in the mobile library will be automatically entered. The data can be changed manually.

4. Under "Membership start date", the current date is entered automatically. You can change the data, if the date entered is not the membership start date.

5. Under "Membership renewal date", leave the field blank. If you keep records on membership validity in the library or if you charge membership or admission fee, the current date will be entered when registering membership validity automatically or when entering debt for membership or admission fee. If it is a library member you wish to transfer from old library member records, you can enter the last membership renewal date manually.

6. Under "Membership expiry date", leave the field blank. If you keep records on membership validity in the library or if you charge membership or admission fee, the new membership expiry date will be entered when registering membership validity automatically or when entering debt for membership or admission fee. This date is calculated on the basis of membership validity period for member category or generally valid membership expiry date will be taken depending on the settings in the **Restrictions on operations** class. If the membership validity is not explicitly specified, the default period is 1 year. Automatically calculated membership expiry date can be changed according to your needs by entering a new one manually. If it is a library member you wish to transfer from old library member records, you can enter the membership expiry date manually.

7. Under "Membership validity", enter the code for the membership validity time period or find it and transfer it from the local code list *Type of membership fee – individual (CODE 318)*. The data that you enter will be taken into account when calculating the membership expiry date and entering an individual membership fee for the member.

8. Under "Statement signed", tick the check-box to indicate whether the member signed the membership statement or not.

Tip:

Upon the library's request, it is possible to specify by means of a special paramater that a control is performed on whether the member signed the statement when becoming a library member. If a member did not sign the statement, a notification will be displayed when switching to the **Member** editor and the **Home library** window. To continue with your work, confirm the notification.

3.1.2.4   Data on member conduct

By clicking the **Info** tab, a window will open containing the data related to member conduct. The data is entered automatically and cannot be changed.

*   Under "Departments", the codes of the library departments that the library member visits are displayed. The data is only displayed for libraries in which loan is organised in separate departments.

*   Under "No. of copies on loan (LOAN)", the number of the member's copies currently on loan will be displayed.

- Under "Date of last overdue notice", the date of the last sent overdue notice will be displayed.

- Under "No. of overdue notices received", the number of overdue notices received by the member up to that day will be displayed.

- Under "Received overdue notices ", the box will be ticked if the member received at least one overdue notice up to that point.

- Under "No. of visits a year (LOAN)", the number of library visits of the member in the current year will be displayed.

- Under "Entered by", the username of the librarian who created the record on the member will be displayed.

- Under "Entered", the date of record creation will be displayed. The date is equal to the date of the first entry, if the library member actually joined the library on the same day as his data was entered to the database.

- Under "Modified by", the username of the librarian, who entered the last change of the member details, will be displayed.

- Under "Modified", the date of the last change of the member details will be displayed.

- Under "Departments – details", if the loan is organised in separate departments within the library, the data regarding the member conduct will be displayed for the separate departments which the member visits (department number, date of last visit, no. of copies on loan, date of last overdue notice, no. of overdue notices received, number of copies lost, no. of visits a year).

3.1.2.5   Transferring member details from the reference students database

Creating a reference students database is described in chapter *3.9*.

If a library sets up a special parameter for transferring data from the reference students database when entering a member, the **Membership card number** window will be updated.

Procedure

1. In the **Membership card number** window, set up the identification number assignment method (see chapter *3.1.1*).

2. Highlight the "From students database" button.

3. Find the record on the student in the reference database. You can search by the user number, membership card number, name or last name. Your search can be truncated by using an asterisk.

4. The window with a list of records on students will open.

5. Double-click the record on the student to open it.

The **Member** editor will open.

6. Check the member details and update it if necessary.

From the reference students database, the following data will be transferred to the member details: name, surname, user number, student transcript number, university in eVŠ, study programme in eVŠ, study programme in eVŠ – B, year of study, mode of study, permanent address postcode, temporary address postcode, business address, date of birth, membership card number, e-mail address, membership expiry date and a note. Based on the mode of study, member category will be automatically defined.

3.1.3   Defining a superior member

Members who use family cards or membership cards of the institution that employs them, are entered as members of the category *019 – family card* or *125 – legal entities – external institutions*. You will define their superior member in the membership data. The superior member or partner must be entered beforehand.

Tip:

To delete the relationship to a superior member, click the 🔍 L261.

3.1.3.1   Family card

Library members using a family card are entered individually. The person whom the card is issued to must be defined as the superior member. For all family members, the member category must be *019 – family card*. For subordinate members, the relationship to the superior member is defined on the **General** tab.

Procedure
1. Once you click the **Superior member** button, the **Search – Member** window will open.

2. Find and select the member you wish to define as superior member.

    If the category of the superior member is not *019 – family card*, it will be changed to that category automatically.
    If you wish to copy the permanent postal address of the superior member, answer the question in the **Address transfer from superior member details** window affirmatively.

3. Save the member details.

When a library member who is a subordinate member and holds a family card visits the library, the **Member** window will open. Use it to select the desired family member.

3.1.3.2 Legal entity card

Library members, who use the membership card of the institution they work for, are entered as subordinate members of that institution – partner. The data on the institution – partner must be entered beforehand. The procedure of entering partner data is described in the *COBISS/Application Administration User Manual* (see chapter *3.1*).

Procedure

1. Once you click the **Superior partner** button, the **Search – Partner** window will open.

2. Find and select the partner.

   If you answer the question in the **Address transfer from superior member details** window affirmatively, the partner's address will be transferred to the member's postal addresses. The type of address will be *business address*.

3. Save the member details.

3.8   BATCH DELETION OF DATA ON INACTIVE MEMBERS

Starting with the COBISS3/Loan, V4.5-01 software version (November 2008), it is possible to individually delete data on inactive members (**Member / Delete member details** object method), whereby inactivity is established by a librarian. Batch deletion of inactive members, however, is performed on the basis of a programme algorithm that defines which member fulfils the condition for deletion from the library's records.

There are two procedures available for batch deletion of inactive members:

- batch deletion of data on *all* inactive members

- batch deletion of data on *specific* inactive members, which are selected by the library

   This procedure is available for easier transition to the daily deletion of data on all inactive members and for deletion of data on inactive members, for which no data on membership validity exists.

3.8.1   Batch deletion of data on all inactive members

Batch deletion of data **on all** inactive members is in accordance with:

- requirements of Article 15 of the Librarianship Act ZKnj-1 (Official Gazette, 87/2001) and Article 21 of Personal Data Protection Act PDPA-1 (Official Gazette 86/2004)

- the information commissioner's interpretation

  - in the SLA publication (23 October 2007) before the SLA session: *To all libraries! Subject: Personal data protection in libraries*;
  - in the on-line publication of the Library News Supplement (2007, (17) 4–5): "*This means that data on inactive members – users, whose membership expired more than a year ago and they no longer have any debts with the library must be regularly deleted*".

The algorithm for batch deletion was confirmed by the National Council for Librarianship (23 April 2008) at their 27th session and later also by the information commissioner in the letter dated 6 May 2008.

When batch deleting inactive members, the members who simultaneously fulfill the following three conditions will be deleted:

Precondition   1. **A member has not visited the library for more than a year.**

A "visit" means any activity in the library (loan, renewal, return, etc.), any activity within the My library service through COBISS/OPAC (renewal, reservation, reservation cancellation, changing the password, or notification

parameters), loan renewal via answering machine or successful member authentication (entering membership card number and password) when logging in to other servers (access to external e-resources). Only members for whom it is recorded under transactions that the date of their last "visit" is sooner or the same as the date of deletion minus one year will not be deleted from the database on members.

If the date of the last visit is empty and other conditions are fulfilled, the data on the member will be deleted. The date of the last visit can be empty as the member was registered by transferring data on members from the excel file.

2. **A member has no debts with the library.**

   A member has no debts with the library when nothing of the following is recorded in any department for the member:

   - material (on loan, reserved, etc.)

   - debt

   - note

   - pending ILL request or material from pending ILL requests

3. **A membership for the member has expired a year or more ago.**

   Membership validity is defined in one of the following two ways:

   - If a library updates the "Membership expiry date" field under member details, the date entered will be taken into account.

   - If a library updates the "Date of entry/membership renewal" field under member details, the membership expiry date will be calculated by adding to this date one of the following values:

     – membership validity period, entered under "Membership validity" for an individual member
     – membership validity period for all membership categories or an individual membership category that was defined by the library using the **Home library / Restrictions on operations** method; the period is added only for the members who have no value entered under "Membership validity"
     – default period of one year, if the **Membership validity** table is empty and no other period is defined under "Validity period" for the member

   If a library does not update data on membership validity for a member (there is no data under "Membership expiry date" and "Date of entry/membership renewal"), a membership for this member will not expire (it is permanent, lifelong). This member will not be automatically deleted from the database, even if he/she fulfils both first conditions for deletion – i.e. the member has not visit the library for more than a year and he/she has settled all debts with the library.

When deleting data on (inactive) members, the members who are not natural persons will be exempt from deletion (category *124 – institution's*

organizational units, *125 – legal entities – ext. institutions* and *126 – interdepartmental loan units*).

> Note:
>
> *To batch delete data on inactive members, the privilege* LOAN_DEL_INACT – Batch deletion of inactive members *is required.*

Procedure

1. Highlight the **Member** class and select the **Class / Batch deletion of all inactive members** method.

2. In the **Deletion of inactive members** window you can specify:

   - Sorting of data on report

     From the drop-down list, select the value that you wish the inactive members in the lists, which are prepared during deletion, to be sorted by. The default value is *Surname*, whereby the values will be sorted by surname and name. In libraries with departments, inactive members will always be sorted first by department ID under "Department", and after that also by the selected value.

   - Execution time

     If you wish the deletion procedure to be carried out later, enter the date and time that you wish the procedure to be performed. If you leave the parameter empty, the deletion procedure will be performed immediately.

> Note:
>
> *In the algorithm for determining a member's inactivity, the current date will always be taken into account, even if the execution time is different from the current date.*

3. Click the **OK** button.

   The **Deletion of inactive members** window will open. In the window, a short statistics of deletion of inactive members will be displayed:

   - number of all members

   - number of members, whose membership expired a year ago, or sooner

   - number of members, where the »Membership expiry date« attribute is empty

   - number of members, where a year or more has passed since their last visit

   - number of inactive members, who will not be deleted as they are not, according to the category data, natural persons

   - number of inactive members who will not be deleted as material is recorded for these members

- number of inactive members who will not be deleted because pending
  ILL requests or material from pending ILL requests are entered for the
  members

- number of inactive members who will not be deleted as they have not
  settled their debts

- number of inactive members who will not be deleted as a note is
  entered for these members

- number of inactive members who will be deleted

4. If you wish to continue the procedure, click the **OK** button.

   Two control lists will be prepared:

   - a list of members who will not be deleted in the procedure as they have
     not settled their debts with the library (entered material, outstanding
     debts, entered pending ILL requests) or a note is entered for the
     members

   - a list of members who will be deleted

   The prepared lists can be viewed and printed to a printer. You can also print
   them later in the COBISS/Reports software module, where they will be
   automatically saved. You can find them in the *Loan* folder, if you select
   Browse stored reports in the menu under **Creating reports**. A window
   containing a list of prepared reports will open. A file name contains the
   date and time of the report creation.

5. After printing or previewing the prepared lists, the **Deletion of inactive
   members** window will open.

   Click the **OK** button to confirm deletion of inactive members.

   After deleting data on inactive members, the membership card numbers of
   deleted members will remain unavailable and you will not be able to assign
   them to new members.

> Tip:
>
> If you start the procedure with a delayed execution time and the deletion
> has not started yet, you can cancel it by selecting the **Class / Cancel
> deletion of inactive members** method in the **Member** class. When the
> procedure is done, you will receive a notification to your e-mail address,
> which was entered under your username.

3.8.2 Batch deletion of data on selected inactive members

When deleting data on selected inactive members, a library can choose the
criteria to be taken into account in deletion. Deleting data on *selected* inactive
members will be different from deleting **all** inactive members in the following:

- instead of selecting all members, select only a specific group of members, where you can automatically check whether all inactivity conditions are fulfilled

- as an inactivity criteria, you can set any number of years since the last visit, whereby the number of years must be 2 or more

- a condition related to membership expiry will not be considered (data will not be deleted, even if the membership expired a year or more ago)

- a condition related to a membership category will not be considered (data on non-natural persons, if they are among the selected members, will also be deleted)

When batch deleting data on selected inactive members, the members who fulfil all three of the following conditions will also be deleted:

Precondition

1. **A member has not visited the library for a longer period of time than the selected number of years.**

   A "visit" is considered any activity in a library (loan, renewal, return, etc.), any activity in the My library service within COBISS/OPAC (renewal, reservation, reservation cancellation, changing the password or notification parameters), loan renewal via answering machine or a successful member authentication (entering membership card number or password) when logging in to other servers (access to external e-resources). Members that you selected in the search window and whose date of their last visit to the library is before the current date, minus the selected number of years (at least two years) will be deleted from the database on members.
   If the date of last visit is empty and other conditions are fulfilled, the data on members will be deleted. You can leave the date of last visit empty as the member was registered by transferring data on members from the excel file.

2. **A member has no debts with the library.**

   A member has no debts with the library when none of the following is recorded in any department for the member:

   - material (on loan, reserved, etc.)

   - debt

   - note

   - pending ILL request or material from pending ILL requests

3. **A member's membership has expired or no data on the membership validity exists.**

   The membership expiry date is not greater than the current date. If the membership expiry date is empty and the member fulfils other conditions for deletion, the data on this member will be deleted.

Note:

To batch delete data on selected inactive members, the privilege CIR_DEL_INACT – Batch deletion of inactive members *is required.*

Procedure   1. Highlight the **Member** class and select the **Class / Batch deletion of selected inactive members** method.

2. In the **Deletion of inactive members** you can specify:

    • Number of years from the last visit

      As inactivity criteria, enter the number of years since the member's last visit to the library. As the number of years must be more than 1, the default value of the parameter is 2.

    • Sorting of data on report

      From the drop-down list, select the value by which you wish the inactive members in the lists, which are prepared during deletion, to be sorted by. The default value is *Surname*, which means that the values will be sorted by surname and name. In libraries with departments, inactive members will always be sorted first by department ID under "Department", and after that also by the selected value.

    • Execution time

      If you wish the deletion procedure to be carried out later, enter the date and time of the procedure to be performed. If you leave the parameter empty, the deletion procedure will be performed immediately.

      +---+
      | Note: |
      | |
      | *In the algorithm for determining a member's inactivity, the current* |
      | *date will always be taken into account, even if the execution time* |
      | *differs from the current date.* |
      +---+

3. Click the **OK** button.

    The **Search – Member** window will open, where you can search for members to be deleted. You can select members by clicking the **Select all** or **Select** button, if you selected only some of the members from the hit list.

4. The **Deletion of inactive members** window will open.

    A short statistics of deletion of inactive members will be displayed in the window:

    • number of selected members

    • number of members who have not visited the library for the selected number of years or more

    • number of inactive members who will not be deleted as material is entered for the members

    • number of inactive members who will not be deleted as pending ILL requests or material from pending ILL requests is entered for the members

    • number of inactive members who will not be deleted as they have not settled their debts yet

- number of inactive members who will not be deleted as a note is entered for the members

- number of inactive members who will be deleted

5. If you wish to continue the procedure, click the **OK** button.

Two control lists will be prepared:

- list of members who will not be deleted as they have not settled their debts with the library (entered material, outstanding debts, entered pending ILL request) or a note has been entered for the members

- list of members who will be deleted

The reports can be viewed and printed to printers. You can also print them out later in the COBISS/Reports software module as they are automatically saved. You can find them in the *Loan* folder, if you select **Browse stored reports** in the menu under **Creating reports**. A window containing a list of prepared reports will open. A name of the file contains the date and time of the report creation.

6. After printing or viewing the prepared lists, the **Deletion of inactive members** window will open.

By clicking the **OK** you confirm the deletion of data on inactive members.

After deleting the data on the selected inactive members, membership card numbers of the deleted members will not become available and you will not be able to assign them to new members.

Tip:
If you start the procedure with a delayed execution time and the deletion has not started yet, you can cancel it by selecting the **Class / Cancel deletion of inactive members** method in the **Member** class.

3.10   ENTERING A VISIT

When you wish to enter a visit in the part of the library where loan is not recorded with a computer (reading room, information desk, etc.), use the **Enter a visit** method in the **Member** class. A visit entered in this way will be taken into account for statistics of visits.

You can enter:

- a visit by a member in the reading room

- a visit by a member for other reasons

- a visit by a member for internet access

- a visit by a person who is not a library member

Procedure

1. Highlight the **Member** class and select the **Class / Enter a visit** method.

    The **Enter visit** window will open.

2. Select the type of visit and click the **OK** button.

    A window will open, where you can enter the membership card number. If you selected *visit by non-member*, a window for entering a membership card number will not open.

3. Enter the (membership or alternative) card number.

    If you leave the edit box empty and click the **OK** button, a search window for a member will open, where you can search for a member by any data.

4. Select the member.

    In the browser in the part of the window **Related objects**, you can see if there is any material on loan for the member, if any restrictions apply to the member, or if there are any outstanding debts entered for the member, etc.

    Under »Date of last visit«, the current date (or the date of performing procedures) is entered; number of visits per year increases for one.

Note:

If a membership has expired for the member or restrictions Entry denied *or* Membership card retained *apply to the member, the visit will not be recorded. Checking the membership validity when entering a visit is turned on by a special parameter upon the library's request.*

A visit entered in this way will be taken into account for the creation of the following reports:

- **LOAN-Mb-02: Active members** and **LOAN-Mb-06: Active members – by department**

- **LOAN-TR-01: Transactions for member – membership card No.** and **LOAN-TR-02: Transactions for member – ID No.** (when the relevant transaction type is selected)

- for statistics of visits **LOAN-STA-C01** to **LOAN-STA-C08**

- for statistics of transactions **LOAN-STA-T01: Transaction – by member category/months**, **LOAN-STA-T02: Transaction – by member category/days** and **LOAN-STA-T03: Transaction – by municipality/member category** (when the relevant transaction type is selected)

4.3   OUTSIDE LOAN

There are two ways for lending material for outside loan to the member:

- enter the item identification number (accession number or loan number) under "AN/LN="

- find the item in the catalogue and then select it from the list of found copies

- select the copy that is reserved for the member (status *O – reserved available copy*, *W – waiting on the shelf*, or *S – on loan (reading room)*)

Note:

*For outside loan, check if the **Outside loan** radio button is selected before you click the **Lend** button.*

The item will be added to the member's list of material. The loan period expiry date is calculated automatically based on the loan period specified for this type of material in the time parameters table (see chapter *2.1*).

Note:

If the member or the material has any restrictions that might restrict or disable the loan, an appropriate warning message will be displayed. In the following cases you can decide if you wish to lend the material despite the restrictions:

– the member has already reached the maximum allowed number of copies on loan

– the availability level (996/997p) set up for the item restricts the loan. This usually applies to the availability level 4 – limited access – reading room, 5 – limited access – with author's permission or 6 – contents of document not accessible

– the status (996/997q) set up for the item restricts the loan. Usually this applies to status 6 – damaged

– the copy is reserved for some other member (reservation of an available copy (status O) or the material is waiting for the member (status W))

– the material with the same COBISS-SI.ID is reserved for the member (status R); if you put the material on loan despite that, the reservation will be deleted

– there is a reservation for another member (the material has status R)

– a member has already borrowed material with the same COBISS.SI-ID in another department (a special parameter is turned on)

– as a rule, the last issue of a serial cannot be borrowed from a library (a special parameter is turned on)

Note:

The material cannot be put on loan in the following cases:

– the item's identification number does not exist

– the item does not belong to the department in which you wish to put it on loan (this applies to the libraries in which loan is organized loan by departments)

– the item belongs to the department in which you wish to put it on loan, but it is currently on interdepartmental loan in another department

– the library will not permit the loan for this type of material (the loan period is not specified in the time parameters table)

– the item is already on loan to a member, retained or lost by a member or reserved for reading room use

– the item is on loan, retained or lost by another member

– the availability level (996/997p) set up for the item disables the loan. This usually applies to availability level 7 – completely inaccessible (archival copy)

– the status (996/997q) specified for the item disables the loan. This usually applies to any status other than 6 – damaged

– loan restriction 0d *(996/997u) specified for the copy prevents outside or reading room loan*

*– the **Lend** button or the **Outside loan** radio button are not active because some restriction preventing outside loan applies to the member (Entry denied, Internet access only, Outside loan not allowed, Membership card retained)*

*– the **Lend** button is inactive because the upper limit of total debts has been exceeded or the oldest date of entered debts is greater than the time limit set (restrictions taken into account are defined by a special parameter upon the library's request)*

– the library does not allow the loan to the members which have at least one item on loan for which the loan period has already expired.

Note:

When defining the loan period expiry date, the library's calendar is taken into account, which means that the loan period cannot expire on a day when the library is closed (see chapter 2.2*). In such a case, the loan period expiry date is set to the following working day.*

Note:

In libraries with departments loan period and calendar of the department to which you are signed in as a user are taken into account if different time parameters and calendars are defined for individual departments.

> **Tip:**
>
> Upon the library's request, the material that is currently on loan to another member can be put on loan by setting up a special parameter. If you wish to put such material on loan, a note will appear indicating that the item is on loan, and you can decide whether the item will be entered as returned under the first member at the same time as it is put on loan to a new member. You can also charge a fine (if a library automatically enters debts for a fine), but you cannot check if any reservations exist for the material as this procedure allows the quickest way of transferring the material to another member; for this reason, no additional controls are available. This is common practice in school libraries.

4.3.1   Lending by entering the item's ID number

If the material you intend to put on loan is in front of you, record the loan by entering the item's identification number:

Procedure

1. Enter the item's accession number or the loan number under "AN/LN=" manually or by using a reader.

2. Check if the **Outside loan** radio button is selected.

3. Confirm the entry by clicking the Lend button.

> Note:
>
> *If your reader is set up to automatically confirm the entry, activate the* **Lend** *button before entering the accession number.*

4.3.1.1   Lending serials

Serials with unbound or partially bound issues can be lent by entering a comma (",") and the loan unit after the accession number. The loan unit can be the number of the individual issue (if the issues are not bound) or a range of issue numbers bound together.

Serials that do not have separate issues (e.g. serials published annually that do not have numbering on the issue level) or serials where all the issues are bound together, can be put on loan, if you only enter the accession number or the loan number.

Example:

If you wish to lend issue number 10:

AN/LN= *220030010,10*

If you wish to lend issues 1 to 5, which are bound together:

AN/LN= *220030010,1-5*

If you only enter the accession number for a serial that has unbound or partially bound issues, the **Select issues** window will open. For each individual issue or partially bound issues, the loan status (available, on loan or loan restriction) will be displayed in addition to the issue details. You can lend one or several units at the same time.

Note:

Upon the library's request, a special parameter can be set to disable a loan of the last issue of a serial in the current year or the last issue of a volume available in the library.

4.3.2   Loan with selection from catalogue

If a member has not found the material they wanted to borrow, you can help the member by finding and selecting the material from the catalogue.

Procedure

1. In the **Home library material** window, click the **Catalogue** button.

    The **Catalogue** window will open. It is divided into two parts: the upper part with search fields and the bottom part for displaying search results.

2. Enter your search request in the search window and click the **Find** button (see chapter *4.11*).

    If your search is successful, the number of found objects and a list of those objects will be displayed. Bibliographic data (title, author, etc.) is first displayed for every found material and followed by the list of copies (accession number, call number, etc.). More about displaying search results in chapter *4.11*.

Note:

In libraries with departments searching of copies is restricted to the department in which you are currently logged in as a user. This restriction can be changed by selecting the searching option in all departments or in a particular department from the drop-down list in the search window. Copies on interdepartmental loan can be searched in the parent department or in all departments.

> Note:
>
> *When searching in the **Catalogue** window, only data on those items for which the holdings are defined is displayed. Data on items which are de-accessioned or which have no accession or call number, availability level or status is not displayed.*
>
> *Items that are not displayed in the catalogue can be found in another way, if necessary, e.g. by using the **Class / Search** method in the **Field 996/997 class**.*

3. Select the item and click the **Lend** button.

4.3.3   Interdepartamental loan

In libraries where loan is organized by departments (e.g. general libraries) only the copies which have sublocation of the department (in subfield 996/997d or 996/997e) can be put on loan in a particular department. Otherwise you will receive an automatic notification warning you that the copy does not belong to that department.

Interdepartamental loan enables you to put a copy on loan for a certain period of time to another department where you can further lend it.

The following conditions must be met in order to perform interdepartmental loan:

Precondition
- In the local code list *Sublocation* the relation between the sublocation and the department must be defined (e.g. *Y – Youth department#01*).

- In the local code list *Departments (CODE 301)* the list of all departments must be defined.

- In Home library you must enter all departments that will participate in interdepartmental loan. The procedure of entering data on department is described in the *COBISS3/Application administration* user manual (see chapter *2.1.4*).

- All copies of material intended for loan must have sublocation in call number in subfield 996/997d, and in case of copy relocation for indefinite period in subfield 996/997e as well.

A department that owns a copy is hereinafter referred to as **parent department** and a department to which the copy is lent is referred to as **host department**.

Interdepartmental loan of material to the host department is recorded in the parent department in the **Home library material** window. The loan procedure between departments is completely the same as loan to the member. Interdepartmental reading room loan is not possible; for this reason, the **Reading room loan** radio button is inactive.

Procedure
1. Highlight the **Department** class and select the **Class / Home library material** method.

The **Search by key** window will open where you will enter two digit host department ID.

2. In the **Department** class you can find the host department in two ways:

- by entering the two digit department ID

    In the **Search by key** window, enter the department ID.

- by selecting the department in the **Search – Department** search window.

    If you leave the field blank in the **Search by key** window, the **Search – Department** window will open. Use it to search all departments by clicking the **Find all** button. You can sort the list of results by the desired attribute and select the desired host department then.

Tip:

If the department is already in the workspace, select it with the mouse and then select the **Home library material** method from the shortcut menu. If you want to put a copy on interdepartmental loan in a quicker way, select the **Put on interdepartmental loan** method.

You can put the copy on loan in the **Home library material** window:

- by entering the ID of the item in "AN/LN="
- by searching and selecting in the catalogue

The copy will be added to the list of material in the department and the status of the copy is *D – interdepartmental loan.* Loan expiry date is automatically calculated based on the loan period which applies in the parent department. The calendar of the parent department is also taken into account.

Note:

Copies put on interdepartmental loan can be lent only to the members in the host department. Further loan of the material through interdepartmental loan to some other department is not possible.

4.3.3.1 Interdepartmental loan from the department without computerised loan

As a rule, material can be put on loan to another department only in the parent department. In departments where loan is not supported by the COBISS3/Loan software, the procedure cannot be performed. In that case, a transaction can be performed in the host department, i.e. in the department where you wish to put material on loan.

Precondition Material belongs to a department where loan is not supported by the COBISS3/Loan software.

1. Log in to the host department.

   You can log in by:

   - highlighting the **Department** class and selecting the **Transition to another department** method and then selecting the host department from the department list
   - selecting the **System / Settings / Lending department** from the menu bar

Procedure 3. In the **Department** class, find the host department in the following two ways:

   - by entering the two-digit department ID
     Enter the department ID in the **Search by key** window.

   - by selecting the department in the **Search – Department** search window

4. Highlight the **Department** object and select the **Put on interdepartmental loan from department without computerised loan** method.

   The **Interdepartmental loan from department** window will open.

5. Under "Department ID", enter the parent department ID without computerised loan.

   A note will appear if the department ID with computerised loan was entered or if the department does not exist.

6. In the **Interdepartmental loan** window, under "AN/LN", enter the identification number of the item.

   Material cannot be put on interdepartmental loan if it does not belong to the selected department or if it was already put on interdepartmental loan.

   Material is entered as put on interdepartmental loan in the host department, where you can put it on loan to members.

Tip:

You can search for material that was put on interdepartmental loan from the department without computerised loan in the **Unavailable material** search window by selecting the department without computerised loan under "Parent department", making a tick under the value *No* under "Returned material", and selecting the status *d – interdepartmental loan* under "Loan status".

4.3.3.2   Interdepartmental return of material to a department without computerised loan

If loan in the parent department is not supported by the COBISS3/Loan software, the procedure of returning material that was borrowed interdepartmentally must be performed in the department that borrowed the material (host department).

Precondition

Material is available and belongs to the department where loan is not supported by the COBISS27Loan software.

Procedure

2. Log in to the host department.

    You can log in by:

    - highlighting the **Department** class and selecting the **Transition to another department** method and then selecting the host department from the list of departments
    - In the menu bar, select the **System / Settings / Loan department** method

7. In the **Department** class, select the parent department. You can do this in the following two ways:

    - by entering the two-digit department ID
      In the **Search by key** window, enter the department ID.

    - by selecting the department in the **Search – Department** search window

8. Highlight the **Department** object and select the **Return interdepartmentally to department without computerised loan** method.

    The **Interdepartmental return from department** window will open, where you can enter the department identification number under »Department ID«.

    If ID of the department with automated loan was entered or if the department does not exist, a note will be displayed.

9. In the **Interdepartmental return** window under »AN/LN«, enter the identification number of the item.

    If the material in the host department is not available or if it was not put on interdepartmental loan, a note will be displayed.

    The material is entered as interdepartmentally returned from host department.

4.4   READING ROOM LOAN

Reading room loan procedure is the same as the outside loan procedure. You can lend material to the member in two ways:

- enter the item's identification number (accession number or loan number) to "AN/LN="

- find the item in the catalogue and then select it from the list of found copies

Tip:

If an item is already reserved for a member (status *O*, *W* or *U*), you can lend the item also by highlighting it in the list and then clicking the **Lend** button.

Before you click the **Lend** button, check if the **Reading room loan** radio button is ticked. The copy will be added to the list of material for the member and has status *S*. The material is normally put on reading room loan only for one day, for this reason, the due date is the same as the date of loan.

If material was previously reserved for reading room use (status *U*), the due date for the material is the same as the reservation expiry date.

When the due date expires, it is displayed in red. If you wish to record debt for the fine automatically, you must define the price for the fine for the material put on reading room loan ("Type of service/debts" is 1*5 – ZCI fine – reading room*).

It is possible to limit the number of copies put on reading room loan in the library:

- you can define the maximum possible number of copies put on reading room loan for individual group (category) of members (see chapter *2.6*)

- you can define the maximum possible number of copies on loan for a member taking into account both copies on outside loan and on reading room loan. If the restriction is not defined for the member, general restriction is taken into account for member category and even if this restriction is not defined, the restriction for the number of copies on reading room loan will be applied.

Note:

If the restrictions are defined for the member or the material which restricts or disables the loan, an appropriate warning will be displayed. In the following cases you can decide if you wish to lend the material despite the restrictions:

– the member has reached the maximum possible number of copies which the members of the same category can borrow

> – *availability level (996/997p) is defined for the copy restricting reading room loan; it usually applies to availability level* 5 – restricted availability – with author's permission *or* 6 – the contents of the document is not available
>
> – *status (996/997q) is defined for the copy restricting reading room loan; it normally applies to status* 6 – damaged
>
> – *the copy is reserved for other member (it is a reservation of available material (status O) or the material waits for the member(status W))*
>
> – *the material with the same COBISS.SI-ID is reserved for the member (status R), if you put the material on loan despite that, the reservation will be deleted*

Note:

The material cannot be put on reading room loan in the following cases:

– *the item's identification number does not exist*

– *the item does not belong to the department in which you wish to put it on loan (this applies to libraries where loan is organized by departments)*

– *the item is entered as on loan, retained or lost for member*

– *the item is entered as on loan, retained or lost for another member*

– *availability level (996/997p) is defined for the item restricting reading room loan; this usually applies to availability level* 7 – completely inaccessible (archival copy)

– *status (996/997q) is defined for the item restricting reading room loan; this normally applies to status that is different from* 6 – damaged

– *loan restriction* 0d *(996/997u) specified for the item prevents outside or reading room loan*

– *the* **Lend** *button is not active if some restriction which, among other, disables reading room loan (Entry denied, Internet access only, membership card retained)*

4.4.1   Entering transaction with material in reading room

Use the procedure if your library does not record loan in the reading room and you would like the loan in the reading room loan to be taken into account for loan statistics.

Procedure

1. Highlight the **Field 996/997** class and select the **Class / Enter transaction with material in reading room** method.

   The **Search by key** window will open.

2. Enter the ID of the item (accession number or loan number).

   The item will be loaded to the workspace.

Entering a transaction with material in reading room differs from entering loan in reading room in the following ways:

- the status of the copy remains *Available*

- data on the member who borrowed the material in the reading room is not recorded; for this reason, the visit by the member is not recorded

A transaction with material in reading room that was entered in this way will be taken into account when creating the following reports:

- for loan statistics from **LOAN-STA-Mt01** to **LOAN-STA-Mt010**

- **LOAN-Mt-01: Material by transaction** (when the relevant transaction is selected)

- **LOAN-Mt-02: List of most requested material**

- **LOAN-TR-03: Transactions involving material** (when the relevant transaction is selected)

4.6   LOAN RENEWAL

Loan renewals for outside loans can only be performed in the **Home library material** window. You have to find the member for whom you wish to renew the loan period first. You cannot renew the loan period for the material put on reading room loan in this way, but you can change the expiry date manually (see chapter *4.7*). You can renew the loan period for the material borrowed through interlibrary loan only for interlibrary loan.

Upon the library's request, a special parameter can be set up to enable loan period renewal for the material for which an overdue notice has been entered and reservation validity renewal for the reserved material (loan statuses *R*, *W* or *O*).

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.

   Find the member by using the library membership card number or some other data (see chapter *4.1*).

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

3. In the **Home library material** window, highlight the item (or items) for which you wish to renew the loan period.

   > Tip:
   >
   > You can select all issues on the list for renewal by clicking the **Select all** button.

4. Click the **Renew** button.

   The new due date for the selected item(s) is calculated on the basis of the renewal period for the individual types of material by taking the current date into account. The current date is also entered as the date of renewal.

When renewing loan period for the item whose loan period has expired, you can record the debt for the fine (see chapter *7.2.2.2*). If a library allows loan renewal for material for which an overdue notice was received, the overdue notice will be deleted when the loan period is renewed.

Note:

In case of loan period restrictions for the member or the material, a warning message will appear. You can decide whether you wish to renew the loan despite restrictions in the following cases:

– the member reached the loan renewal limit for the item

– the availability level or the status set up for the item restricts the loan (see chapter 2.3). This usually applies to the availability levels (996/997p) 4 – limited access – reading room, 5 – limited access – with author's permission or 6 – contents of document not accessible (special treatment) and status (996/997q) 6 – damaged.

– the loan period is exceeded and the member has already received an overdue notice for the item on loan

Note:

The loan cannot be renewed for the material in the following cases:

– the item is on interdepartmental loan (status D – interdepartmental loan), the **Renew** *button is not active*

– the item was borrowed through interlibrary loan (status M – interlibrary loan)

– the item is entered as retained or as lost for the member (status B or L)

– the member has the restriction "Renewal denied", the **Renew** *button is inactive*

– the **Renew** *button is inactive because the upper limit of total debts has been reached or the date of the oldest entered debts exceeded the time period (restrictions that are taken into account are defined by setting special parameters upon the library's request)*

– the library will not allow renewals for this type of material (the renewal period in the time parameters table is 0d *or is not specified at all)*

– the availability level or the status set up for the item prohibits the loan (see chapter 2.3). This usually applies to availability level (996/997p) 7 – completely inaccessible (archival copy) or to any status (996/997q) other than 6 – damaged

– the loan restriction (996/997u) for the item is set to 0d *(996/997u)*

– the newly defined loan period due date would be older than the previously defined one

– the material is reserved for other member

– the library does not allow loan renewal for the material for which an overdue notice has been issued

– the library does not allow the loan renewal to members which have at least one item on loan for which loan period has already expired.

Note:

When defining a new loan period expiry date, the library's calendar will be taken into account, so the loan period cannot expire on the day when the library is closed (see chapter 2.2). In this case, the first working day is defined as the due date.

Note:

If different time parameters and a calendar are set for individual departments, the renewal date and the calendar of the department where we are logged in are taken into account.

4.7   CHANGING THE DUE DATE

In case of special treatment of a specific material or a specific library member, you can set up a new due date that is different to the one normally calculated based on the time parameters for that type of material. First, put the item on loan. The loan period will be set up based on the time parameters for this type of material. Next, you can change the due date as required. You can change reservation expiry date and status *B – retained* and status L – *lost* expiry date in the same way. The procedure can only be performed in the **Home library material** window. In order to renew the loan, you have to find the member first.

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.

   Find the member by using the library membership card number or some other data (see chapter *4.1*).

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

3. Highlight the due date that you wish to change.

   Double-click the due date (7th column Due/ovrd) for the item in the list of material. Overwrite the old due date with the new due date, and confirm the date by pressing the <Enter> key.

Tip:

If you wish to change the date for several copies simultaneously, hold the <Ctrl> key, highlight the copies and double-click on one of the due dates of the highlighted copies (you can now release the <Ctrl> key). Enter the new due date and confirm by pressing the <Enter> key. The due dates will be changed.

Tip:

If you wish to change the date for all copies on loan simultaneously, select all the copies by clicking the **Select all** button, then press and hold the <Ctrl> key and double-click one of the due dates for the selected copies (you can now release the <Ctrl> key). Enter the new due date and confirm by pressing the <Enter> key. The due dates will be changed.

Note:

You cannot change the due date for the material that was reserved or borrowed through interlibrary loan.

In a similar way, you can enter an unlimited due date by pressing the <X> key. The new due date will be displayed as XX.XX.XXXX.

If you wish to extend the due date for any number of days (d), weeks (w), months (m) or years (y), delete the calculated due date and then enter the number and symbol of the period (e.g. 3m for 3 months) in place of the date.

The current date is entered as the date of the last update.

When changing loan period for the item whose loan period has expired, you can enter the debt for the fine (see chapter *7.2.2.2*).

Note:

The new due date you enter must be more recent than the current date.

Note:

When changing the due date manually, the loan period restrictions for the member or item will not be checked. If there is a reservation of the material for another member or a reservation for interlibrary loan, a note will be displayed, but you can change the due date despite the reservation.

7.2   ENTERING DEBTS

If you charge library members for some library services, you can enter the debt manually or automatically when performing the procedure. The precondition is that the price list is defined prior to this except when charging services for interlibrary loan (see chapter *7.1*).

7.2.1   Entering debts manually

When you wish to enter debts for which automatic procedure is not provided, you must do it manually. Debts can be entered for library members only.

Procedure
1. In the **Member** class, find and select the member.

2. Select the **Object / Entering and settling debts** method.

3. The **Entering and settling debts** window will open.

4. Click the **Enter debts** button.

5. The **Debts entry – select service/debts** window will open.

   All services and debts will be displayed on the list. In libraries with departments in which different price lists apply the price list of the department to which you are logged in as a user will be displayed. In the drop-down list in "Type of service/debt" you can limit the list to individual group (e.g. *FIN fine*).

6. Select the service/debt from the list and click the **OK** button.

7. The **Entered debts** window will open.

   Data on the selected service or debt will be displayed from the price list in individual fields. If necessary, you can edit the data in "Price per unit", "Tax group", "Number of units" and "Discount rate". Discount rate must be entered as integer number, e.g. 50 for 50 per cent discount. The debts amount is calculated on the basis of this data. You can enter additional description under "Properties" and a note under "Note".

8. Confirm the amount of the entered debts by clicking the **OK** button.

   Entered debts will be added to the list of debts, at the same time the amount of the entered debts will be added to the total amount of debts for the member.

> Note:
>
> *Members' debts for interlibrary loan services are recorded in interlibrary loan (see* COBISS3/Interlibrary Loan User Manual, chapter *5.12*).

What to do next   Enter debt settlement (see chapter *7.3*).

> Tip:
>
> You can access the **Entering and settling debts** window from the **Home library material** window by clicking the icon ▣ next to the text Debts.

7.2.2   Entering debts automatically

Debts related to some procedures (e.g. fine when returning the material) can be entered automatically.

Currently it is possible to enter automatically:

- membership fee or admission fee when entering a new member (Member / New object), when editing member's details (Member / Edit) and when accessing the window with records on material (Member / Home library material) of the member whose membership has expired

- fine when returning, renewing loan period or changing loan period expiry date for the material whose loan period has expired

- costs of notification when allocating reserved material to the member

- costs of overdue notices when creating overdue notices

- loan fee or tear and wear fee when material is put on loan or when renewing loan period

- cost of reservation of available material for the loan of reserved material for a member, if material has status *O – reserved available copy*

- cost of uncollected material when deleting an expired reservation, if material has status *W – waiting on the shelf (reservation)*

- cost of issuing a new membership card when registering a new member

7.2.2.1   Membership or admission fee

Precondition   Automatic entry of the debt for membership or admission fee can be performed if the following conditions are fulfilled:

- parameter for controlling membership validity is set

- price for membership fee or admission fee (type of service/debts 01 – CLA membership fee/admission fee) is entered to the price list for a certain member category, where the value *automatically* is set under "Calculation method"

- member is not exempt from membership fee (check box under

Exempt from membership fee is not ticked)

- new member (membership expiry date has not been entered yet) or the membership expired (membership expiry date is older than the current date)

- parameter for exemption from membership fee for members younger than 18 is set (the member, however, is older than 18)

Debt for admission fee is automatically calculated and recorded when entering new member. Once you finish entering data in the **Member** editor and you confirm the entry to the database of the members by clicking the **OK** button, the **Membership fee/Admission fee** window will open. Debt amount for membership fee will be displayed from the price list depending on the member category. If your answer is yes and you click the **Yes** button, the following will be recorded automatically:

- debt for the member

- current date in "Date of entry/membership renewal" (tab Membership in the Member editor)

- new membership expiry date in "Membership expiry date" (tab Membership in the Member editor) which is calculated depending on the settings related to membership validity period

Debt for membership fee is calculated automatically and recorded during the first visit of the member whose membership expired. Membership validity can be verified when accessing the **Home library material** window and when saving the data in the **Member** editor. The procedure of automatic entering of debt for membership fee is the same as for admission fee.

Membership validity is defined in one of the following ways:

- as membership period set in restrictions on operations for a specific or all membership categories (see chapter 2.6)

- as a date set in restrictions on operations which applies to all members of those categories for which membership validity period is not specified in restrictions on operations

Note:

Unless otherwise specified in restrictions on operations, the default membership validity period is 1 year.

Tip:

Upon the library's request it is possible to define with a special parameter that, when calculating new membership expiry date, membership validity period is calculated from membership expiry date instead of the current date.

What to do next   Enter debts settlement (see chapter *7.3*).

7.2.2.1.1 Individual membership fee

In addition to automatically entering a membership fee or admission fee which is related to a member category (see chapter *7.2.2.1*), a library can also use the option of automatically entering an individual membership fee or admission fee. The method of entering a membership fee or admission fee is customized for individual members and is related only to membership validity period.

If you wish to enter the membership fee customized for individual members, the following must be defined:

- in the local code list *Type of membership fee – individual (CODE 318)*, enter types of membership fee for different time periods that will be provided by your library; to define the time period, use the number of days, months or years (e.g. 14d, 2m, 2y, etc.).

> Example:
>
> The local code list *Type of membership fee – individual (CODE 318)* can be defined according to the library's requirements, the codes, however, should not contain more than three-digits, and the value after # must contain the time period in the prescribed structure (e.g. 7d, 100d, 6m, 5y); for example:
>
> 7d – weekly membership fee#7d
> 14d – two-week membership fee#14d
> 1m – monthly membership fee #1m
> 6m – half-yearly membership fee#6m
> 2l – two-year membership fee#2y
> 25l – permanent membership#25y
>
> etc.
>
>
> or:
>
> 01 – weekly membership fee#7d
> 02 – two-week membership fee #14d
> 03 – monthly membership fee#1m
> 04 – half-yearly membership fee #6m
> 05 – two-year membership fee #2y
> 06 – permanent membership#25y
>
> etc.

- in the price list, enter the price of the membership fee or admission fee (Type of service/debts *24 – CLS membership fee – individual*) for a specific time period and select the value *automatically* under "Calculation method"

- under member details in the **Membership** tab under the "Membership validity" attribute, select the relevant value of the time period for the individual membership fee on the basis of the local code list *Type of membership fee – individual (CODE 318).* The "Membership expiry date" attribute will be calculated automatically when you register a

new member or renew membership on the basis of the entered time period under the "Membership validity" attribute (see chapter *3.1.2.3 Entering membership data*).

7.2.2.2   Fine

Precondition   It is possible to enter debts for overdue fine automatically, if the following conditions are fulfilled:

- price for the fine for which the value in "Calculation method" is set to *automatic* is entered in the price list for the type of material

- expiry date is older than the current date for the copy which is put on outside loan or reading roam loan

- the member is not exempt from overdue fine (the check box in the privilege Fine exempt is not ticked)

The debt for the fine is calculated automatically and recorded when returning the material, renewing loan period or changing expiry date. If the conditions for automatic entry of debt for overdue fine are fulfilled, the **Fine** window will open when using one of these methods. One or more copies you selected during the procedure and whose loan period expired can be found in the window. Accession number, type of material, number of days of delay and debt amount for the fine is displayed for each copy.

Debt amount for the fine is calculated by multiplying a daily fine by the number of days of delay starting from the expiry date. All copies are already selected in the **Fine** window by default. If you do not wish to charge the fine for a certain copy, you can deselect it. Confirm the selection by clicking the **OK** button. If you do not select any copy or if you close the window by clicking the **Cancel** button, the debt for the fine will be deleted, although the desired procedure with the material will be performed. If a library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off the debt when performing the procedure (see chapter 7.5).

Tip:

Fine status on the current date for the copies whose loan period expired can be checked if you click the **Current fine** button in the **Entering and settling debts** window.

Tip:

At library's request it is possible to set a special parameter which, when calculating the number of days of delay, takes into account only working days according to the calendar of the library or of the department.

	Tip:
	If the library allows returning of material without charging the fine because the material is returned within a specific period after loan period expired, this period must be defined in time parameters table (see chapter *2.1*). If the material is returned within this period, the fine will not be charged, but the first day after this period expires, the fine will be charged for all days of delay.
	At library's request it is possible to set a special parameter that does not take into account grace period when calculating the number of days of delay.

	Tip:
	If the library does not charge daily fines, upon request it is possible to set a special parameter that does not take into account the number of days of delay when calculating debt for fine, but the amount from the price list.

	Tip:
	In case of daily fine, the amount of unsettled fine can quickly grow, thus it is less likely that the member will settle his/her debt. Therefore, at library's request, it is possible to set up a special parameter which restricts the number of days when the amount of unsettled overdue fine increases.

What to do next   Enter debt settlement (see chapter *7.3*).

7.2.2.3   Notification about available reserved material

Precondition   Automatic entry of the debt for notification about allocating reserved material to the member is possible if the following conditions are fulfilled:

- the price for notification about available reserved material is entered to the price list and the value *automatically* is entered under "Calculation method"

- the member is *not* subscribed to notifications about available reserved material

Debt for notification about available reserved material is automatically entered:

- when returning the reserved material if the material is allocated to the member who reserved it (status *W*)

- when you prepare available material that the member reserved for collection (see chapter *4.13.1.1*)

If the conditions for entering debt for notification are fulfilled, the **Cost of notification about availability of reserved material** window will open. Details of the member to whom the reserved material is allocated after

returning and the amount of debt will be displayed. If your answer is yes and click the **Yes** button, the debt will be entered automatically. If your answer is no and you click the **No** button, the cost of notification about availability of reserved material will be written off. If the library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off debt (see chapter *7.5*).

What to do next   Enter debt settlement (see chapter *7.3*).

7.2.2.4   Costs of overdue notices

Precondition   Debts for costs of overdue notices are entered automatically when preparing overdue notices (see chapter *8.1*), if the following conditions are fulfilled:

- the member received overdue notice for the material whose loan period expired

- the price for the costs of overdue notices is entered to the price list, the value automatic is entered in "Calculation method"

Costs of overdue notice can be specified in two ways:

- from the price list on the basis of the amount which represents the costs of the overdue notice (e.g. costs for the 1st overdue notice) regardless of for how many copies the member received this overdue notice

- from the price list on the basis of the amount calculated for each copy for which the member received an overdue notice; the price can vary depending on the type of material

> Note:
>
> Calculation method for overdue notices can be set up by a special parameter at the library's request.

7.2.2.5   Loan fee or wear and tear fee

A library can charge a loan fee or a tear and wear fee to its members.

Precondition   Debts can be entered automatically if the following conditions are fulfilled:

- in the price list, a price for the loan fee is entered for different types of material, for which the value *automatic* is entered under "Calculation method"; prices are entered for those types of material for which loan fee is charged
- member is not exempt from paying the loan fee (check box under "No loan fee" is not ticked)

Debts for loan fee are entered automatically when material is put on outside loan or when loan period is renewed (if the loan period expiry date is greater than before it was renewed).

After clicking the **Lend** or **Renew** button, a question whether you wish to enter the debt, data on the selected material and the price for the loan fee will be displayed in a new window. If the answer is yes, the loan fee amount will be added to the amount of entered debts for the member. If the answer is no, the material will be put on loan for the member but the loan fee will not be recorded. If the library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off the debt (see chapter *7.5*).

Note:

Debts for the loan fee are **not** *entered automatically:*

– if the loan period expiry date is changed manually

– if a member renews the loan period through the My library service

– if a member is exempt from paying the loan fee (the "No loan fee" check box is ticked)

7.2.2.6   Cost of reservation of available material

A library can charge costs of reservation of available material to its members.

A debt can be automatically entered when reserved material is put on loan to a member if the material was not prepared for collection by using the **Unavailable material / Prepare reserved material for collection** method (in which case the material will get the status *W – waiting on the shelf (reserved)*).

Precondition   The following conditions must be fulfilled:

- in the price list, the price for the cost of reservation of available material (item *NAR*) is entered, and the value *automatically* is selected under "Calculation method"

- reserved material has the loan status *O – reserved available copy*

After you click the **Lend** button, a new window will appear with a question whether you wish to enter the debt, data on the selected material and the price of the cost of reservation of available material. If your answer is yes, the amount will be added to the amount of entered debts for the member. If your answer is no, the debt will not be entered. If the library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off this debt (see chapter *7.5*).

7.2.2.7   Cost of uncollected reserved material

A library can charge a cost of uncollected reserved material to its members.

Entering debts automatically can be performed when deleting an expired reservation for the member if the material was ready for collection (status *W* in loan procedures).

Precondition   The following conditions must be fulfilled:

- In the price list, the cost of uncollected reserved material (item *ZNR*) is entered and the value *automatically* is selected under "Calculation method"

- reserved material is waiting for the member and has the status *W – waiting on the shelf (reserved)* in loan procedures

- date of reservation validity has expired

You can delete an expired reservation individually in the **Home library material** window or you can batch delete expired reservations (see chapter *4.13.4*). When deleting an individual reservation in the **Home library material** window, a question whether you wish to enter the debt, data on the selected material and the cost of uncollected reserved material will be displayed in a new window. If your answer is yes, the amount will be added to the amount of entered debts for the member. If your answer is no, the debt will not be entered. If the library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off this debt (see chapter *7.5*).

7.2.2.8   Cost of issuing a new membership card

When registering a new member, a library can charge the cost of issuing a new membership card to its members.

Precondition   The following conditions must be fulfilled:

- the cost of issuing a new membership card for a specific member category is entered in the price list (item *NIZ*) and the value *automatically* is selected under "Calculation method"

Entering a debt automatically can be performed when registering a new member when you save the data on the new member by clicking the **OK** button. When you do this, a question whether you wish to enter the debt, the data on the selected material and the cost of issuing a new membership card will be displayed. If your answer is yes, the amount will be added to the amount of entered debts for the member. If your answer is no, the debt will not be entered. If the library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for writing off this debt (see chapter *7.5*).

7.4   OVERVIEW OF DEBTS

You can see the debts recorded for the member in two ways:

- in the **Entering and settling debts** window

- in the **Entered debts** class

Procedure

1. In the **Member** class, find and select the member.

2. Select the **Object / Entering and settling debts** method.

   The **Entering and settling debts** window will open.

   ┌───┐
   │ Tip: │
   │   │
   │ If you are in the **Home library material** window, click the icon under │
   │ member's name.   │
   │   │
   │ If you wish to view the current fines, click the **Current fine** button. │
   │   │
   │ When viewing transactions in the **Entering and settling debts** window and │
   │ in the **Transaction** class, under the transaction types *writing off debts* and │
   │ *debts deletion*, a reason for deletion or writing off debts will be displayed │
   │ (column *Reason of deletion/writing off debts*).   │
   └───┘

   In libraries with departments it is possible to select the department for
   which you wish to see the entered debts in the upper right corner. The
   department to which you are logged in as a user is selected by default. If
   you wish to see all debts entered for the member, select *all departments*.

3. On the list of entered debts highlight the debt with the mouse and click the
   Show button.

   In the **Viewing – Entered debts** window details on the entered debt will be
   displayed.

7.5   DELETING DEBTS

Debts entered for the member can be deleted in the **Entering and settling debts** window. Highlight the debt(s) on the list of entered debts and click the **Delete debts** button.

If a library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for deletion when deleting the debt.

Tip:

A library can create the local code list *Reasons for deletion/writing off debts (CODE 317)*. If a library created the code list, a reason for deletion or writing off debts must be selected from the code list in the procedure of deletion or writing off debts, which will appear when viewing transactions for the member in the **Entering and settling transactions** window and in the LOAN-CRO-03 and LOAN-TR-04 reports.

Example:

The local code list *Reason for deletion/writing off debts (CODE 317)* can be customized according to the library's requirements, e.g.:

01 – certificate issued by Employment Service of Slovenia
02 – error (found on the shelf)
03 – error (reading room loan)
04 – donated membership fee (member donation)
05 – error when selecting debt
06 – error in e-notification
07 – member's accident/illness (approved by director)
etc.

Note:

To delete a debt, the privilege CRO_DEL – Deleting debts *is required.*

8.1   CREATING OVERDUE NOTICES

The procedure of creating overdue notices enables automatic entering of overdue notices for the material whose loan period expired and automatic entering of debts for overdue notices. Library defines the criteria concerning how much time can elapse from loan period expiry before the member gets the overdue notice and in which time intervals the overdue notices should be sent (see chapter *2.1*).

Example:

The member will receive overdue notice depending on grace period settings for individual overdue notices in time parameter table:
1. overdue notice = 3d means 3 days after loan period expiry
2. overdue notice = 7d means 7 days upon reception of the 1st overdue notice
3. overdue notice = 14d means 14 days upon reception of the 2nd overdue notice
4. overdue notice = 21d means 21 days upon reception of the 3rd overdue notice

Library can send up to 4 overdue notices to the member. How many overdue notices will be sent is defined by a special parameter at library's request.

The library can also define the price and the method of charging the costs for overdue notices (see chapter *7.1*). A special parameter can define whether the costs for overdue notices will be charged by notice or by the number of copies for which the member received individual overdue notice.

Precondition   When creating overdue notices the member receives overdue notice for the material whose loan period expired (status *C* and *S*), if the following conditions are fulfilled:

- the member does not have the privilege *No overdue notices*

- after the loan period expiry date, the grace period for the 1st overdue notice in the time parameters table ended (if the grace period is not defined, the member will receive the 1st overdue notice the day after the loan period expires)

- after the date of reception of the previous overdue notice, the grace period for the specific overdue notice (2nd, 3rd and 4th) in the time parameters table ended (if the grace period is not defined, the member will receive a higher overdue notice one day later than the previous overdue notice); the loan period that was renewed after the previous overdue notice was received also expired

- the member did not receive the last overdue notice for the material sent by the library

Note:

For the creation of overdue notices, the privilege LOAN_OVR – Overdue notices *is required.*

Note:

The procedure of creating overdue notices can be performed only once a day. Also, it is not possible to create overdue notices if you did not print already created overdue notices on a printer.

Procedure

1. Highlight the **Overdue notices** class and select the **Class / Create overdue notices** method.

    The **Create overdue notices window** will open where the date of the last overdue notice creation is displayed. In libraries with departments the list of departments which you can access by your username and data on the last overdue notice creation for every department is displayed.
    If you have already created overdue notices, but you did not sent them yet, a warning message will be displayed in the right window.

2. By clicking the **Create** button you will activate the procedure of creating overdue notices.

    In libraries with departments, before doing that you will select the department in which you wish to create overdue notices. You can select several departments or all departments at the same time.

Note:

When creating overdue notices you cannot perform other procedures at the same time, therefore it is recommended to create overdue notices outside working hours of the library or to create a scheduled job. You can activate the procedure of creating overdue notices later by entering date and time in "Execution time". Once the overdue notices are created, you will receive an e-mail notification to your e-mail address.

3. Wait until the **Creation of overdue notices completed** window opens.

    Brief statistics for created overdue notices will be displayed in the window. If you activated the procedure for several departments at the same time, brief statistics will be displayed for every department.

4. After clicking the **OK** button, the **Sending of overdue notices** window will open.

    It is recommended to send the created overdue notices as soon as possible. The overdue notices are created on the basis of predefined forms (see chapter *A.2.6*).

    In libraries with departments you can select the overdue notices created in individual departments for sending.

    If you do not wish to send them yet, click the **Close** button.

5. In the **Note** window you will be asked to confirm the sending of overdue notices.

> Note:
>
> *Overdue notices that were sent cannot be cancelled!*

Overdue notices are sent to the selected destination (usually a printer).

Information on whether the member received the overdue notice can be seen in records on material for the member (the **Home library material** window):

- note indicator *OVR* will be displayed in the upper right corner; in libraries with departments this indicator is displayed if the member has an overdue notice in any department; *OVR* indicator is automatically deleted when there is no overdue notice recorded for the member

- date of the last overdue notice receipt is displayed on the list of material in the column *Due/ovrd* (7th column) for the copy

- number of the last received overdue notice is displayed on the list of material in the column *Delay/ovrd/No.* (8th column) for the copy

Information whether the member has received the overdue notice can be also seen in member details (the **Member** editor):

- on the **General** tab the "Current overdue notices" check box is ticked; this value is automatically changed when the member has no recorded overdue notices any more

- on the **Info** tab in "Date of last overdue notice" the date when the last overdue notice was sent to the member is displayed

- on the **Info** tab in "No. of overdue notices received" total number of overdue notices received by the member until that day is displayed; this number includes settled and unsettled overdue notices

- on the **Info** tab the "Received overdue notices" check box is ticked if the member received at least one overdue notice until that day; the values are entered automatically and can be changed if you delete the data on received overdue notices for the member manually (see chapter *8.4*)

- in libraries with departments the data on the number of received overdue notices and the date of the last overdue notice can be seen in the **Details by department** window if you select individual department and click the **Show** button.

Data on individual received overdue notices can be also seen if you select the folder **Overdue notices** on the workspace in member's relationships or if you select the **Delete received overdue notices** method (see chapter *8.4*).

If the library charges the costs for overdue notices to the members, a debt for overdue notice will be entered automatically when creating overdue notices.

You can see the debts for overdue notices for the member by using the **Entering and settling debts** method (see chapter *7.4*).

Tip:

You can find created overdue notices in the **Overdue notices** class by using the **Class / Find** method. The colours of the displayed overdue notices designate status of the overdue notice. If the overdue notice has been created, but not yet sent (during the procedure of creating overdue notices or by using the **Overdue notice / Send overdue notices** method), it will be displayed in red colour. If the overdue notice has already been sent, it will be displayed in black colour. If all the material from the overdue notice is already returned, it will be displayed in green colour.

8.4   DELETING INDIVIDUAL OVERDUE NOTICES

Every overdue notice can be deleted for the member in the following two ways:

- automatically when returning the material for which the member received overdue notice

  When returning the material data on received overdue notice for the material is deleted automatically. If the member received the same overdue notice for several copies of material, data on overdue notice will be deleted when the last copy of material is returned for which the overdue notice was issued. The debt for the overdue notice will remain entered until it is settled by the member.

- manually by deleting individual overdue notices for the selected member

  The procedure of manual deletion is described below.

Note:

To delete overdue notices manually, the privilege LOAN_OVR – Overdue notices *is required*.

Precondition   Only overdue notices for the material that was returned (green overdue notices) and overdue notices that have not yet been sent (red overdue notices) can be deleted. In libraries with departments you can delete overdue notices in those departments which you can access with your username and password.

Procedure   1. Find and select the member in the **Member** class.

2. Select the **Object / Delete received overdue notices** method.

   The **Deleting received overdue notices** window will open containing the list of overdue notices. In libraries with departments all overdue notices are displayed regardless of the fact in which department the member received.

3. Highlight one or more overdue notices and delete it by clicking the **Select** button.

   Data on overdue notice is deleted for the member. At the same time, debt for overdue notice is also deleted if it was entered automatically.

   If a library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select the reason for deletion in the procedure of deleting received overdue notices (see chapter *7.5*).

A   REPORTS

Reports for loan purposes are created and printed in the COBISS3/Reports software module. The report layout is predefined. However, you can change the content by entering individual parameters when you prepare the report. You can choose one of the following pre-prepared reports:

- Members

    – LOAN-Mb-01: Selected members
    – LOAN-Mb-02: Active members
    – LOAN-Mb-03: List of members with notes
    – LOAN-Mb-04: Deleted members
    – LOAN-Mb-05: Members - changed details
    – LOAN-Mb-06: Active members - by department

- Material

    – LOAN-Mt-01: Material by transactions
    – LOAN-Mt-02: List of most requested material

- Members and material

    – LOAN-MM-01: Members with material on loan
    – LOAN-MM-02: Material by status
    – LOAN-MM-03: Members and loan period date about to expire
    – LOAN-MM-04: Notification about a loan period expiry date (mail)
    – LOAN-MM-05: Notification about a loan period expiry date (e-mail)
    – LOAN-MM-06: Recipients of e-mail notification

- Transactions

    – LOAN-TR-01: Transactions for member - membership card No.
    – LOAN-TR-02: Transactions for member - ID No.
    – LOAN-TR-03: Transactions involving material
    – LOAN-TR-04: List of cash register transactions

- Cash register operations

    – LOAN-CRO-01: List of invoices

- Overdue notices

    - LOAN-ON-01: Overdue notices
    - LOAN-ON-02: List of recipients of overdue notices

Subchapters:

- Creating and printing reports
- Groups and report description

parameter. If you do not specify the parameter, the report will be created for all departments.

- **LOAN-MM-02: Material by status** is a report which contains a list of material based on its current status. When creating the report, besides the status of the material, you can specify the type of material and the call number. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

- **LOAN-MM-03: Members with loan period date about to expire** is a report which contains a list of members who have material on loan whose loan period has expired or is about to expire within a certain period of time. When creating the report, you can specify the beginning and the end of the period, class or grade of the member, member category and study programme. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

- **LOAN-MM-04: Members with loan period date about to expire** is a report which contains a list of members who have material on loan whose loan period has expired or is about to expire within a certain period of time. The created notifications are intended to be printed on a printer. When creating the report, you can specify the beginning and the end of the period, type of material, department or year and member category. In libraries with departments the notifications are created only for the department in which you are signed in as a user.

- **LOAN-MM-05: Notification about a loan period expiry date (mail)** is a report which contains a list of notifications for the members with a list of material whose loan period has expired or is about to expire within a certain period of time. The created notifications are intended to be sent by e-mail. When creating the report, you can specify the beginning and the end of the period, type of material, department and member category.

- **LOAN-MM-06: Recipients of e-mail notification** is a report which contains a list of members who will receive a notification about loan period expiry date by e-mail when creating the report LOAN-MM-05. When creating the report, you must enter the same parameters (beginning and end of the period, type of material, department or year and member category) you enter when creating the report LOAN-MM-05. In libraries with departments specify the department in which you created the LOAN-MM-05 report in the "Library department" parameter. If you do not specify the parameter, the list will be created for all departments!

Tip:

The text of the notification about loan expiry date (LOAN-MM-04 and LOAN-MM-05) can be altered any way you like. In order to do so, copy the standard variables *Introductory text (LOAN-MM-04, LOAN-MM-05)* and *Conclusion*

text (LOAN-MM-04, LOAN-MM-05) to the user variables and change the text accordingly. In a similar way, you can also change the signature on the notifications (*Signature on notifications* variable).

A.2.4   Transactions

In the **Transactions** group of reports, you can create a list of transactions for a specific member or a list of transactions for a specific item of material. To create and print any of the reports from this group, a special privilege is required.

Note:

To create and print any list from this group, the privilege RPT_SPC – Special privileges in reports *is required.*

You can select one of the following report types:

- **LOAN-TR-01: Transactions for member – membership card No.** is a report which contains a list of transactions for a selected member within certain period of time. When creating the report, you can specify membership card number, beginning and end of the period and type of transaction. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

- **LOAN-TR-02: Transactions for member – ID No.** is a report which contains a list of transactions for a selected member within certain period of time. Unlike the report LOAN-TR-01, the member is specified via the ID number (attribute "Member ID") and not the membership card number, which can change when the member receives a new membership card. When creating the report you can specify the beginning and the end of the time period and the type of transaction. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

- **LOAN-TR-03: Transactions involving material** is a report which contains a list of transactions for a selected copy of material within certain period of time. When creating the report you can specify the item's accession number, the beginning and the end of the time period and the type of transaction. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

- **LOAN-TR-04: List of cash register transactions** is a report which contains a list of cash register transactions, entered by a specific

member within a certain period of time. When creating the report, define the member by using his/her ID number (attribute "Member ID") or select all members and define the username (attribute "Entered by"). If necessary, you can also define the criteria for other attributes in the window for entering query parameters (e.g. "Transaction type", "Entered", "Reason for deletion/writing off debts, etc.). In a library with departments, you can create a list for individual departments by entering the "Library department" parameter. If the parameter is not defined, a list will be created for all departments.

A.2.5   Cash register operations

In the **Cash register operations** group of reports you can create lists related to cash register operations.

You can select one of the following report types:

- **LOAN-CRO-01: List of invoices** is a report which contains a list of settled debts and cancelled settlements within a certain period of time. When creating the report you can specify the beginning and the end of the period and the username. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments. The report contains a list of all transactions within a certain period of time. It also contains cancelled settlements for which the amount is displayed as a negative value. A list of non-cash payments outside the library (e.g. payments with Moneta in the My library service) will be displayed on a special form.

  LOAN-EXP-01: Izpis Računi glave.txt is a report containing aggregated data on issued invoices for payments in cash. You can find it in the *Data for further processing* folder. The report is created upon the request of the tax authority and is in compliance with the requirements of *R U L E S on the requirements for computer applications and electronic devices, administration and operation of the information system and contents, form, method and time limits for submission of data* (Ur. l. RS, No. 42/13). When creating the report, you must specify the start and end of the period. After you create the report, save it in a text file.

  LOAN-EXP-02: Izpis Računi postavke.txt is a report containing data on items on issued invoices for payments in cash. You can find it in the *Data for further processing* folder. The report is created upon the request of the tax authority and is in compliance with the requirements of *R U L E S on the requirements ....* When creating the report, you must specify the start and end of the period. After you create the report, save it in a text file.

A.2.6   Overdue notices

In the **Overdue notices** group of reports you can print forms for overdue notices and prepare a list of recipients of overdue notices.

You can select one of the following report types:

- **LOAN-ON-01: Overdue notices** is a report intended for printing forms for overdue notices. In that way, you can repeat printing of overdue notices, if you have already sent them upon their creation, since it is not possible to print them by using the method **Send overdue notices** in the COBISS3/Loan software module any more. This report is also used when an error occurs while printing on a printer and when the forms must be re-printed.

  When creating the report, the **Search – Overdue notices** search window will open. Use it to find the overdue notices you wish to print (e.g. by entering the date in "Entered" you can search for overdue notices created on a given day).

  Besides the forms, a list of recipients without address will be also prepared when creating this report. Overdue notice is not printed Overdue notices are not printed for members who have no postal address.

Note:

Printing overdue notices from the COBISS3/Reports software module does not affect the status of overdue notice. This means that the created overdue notices, displayed after the report is created in the COBISS3/Reports software module, should be send by using the method for sending in the COBISS3/Loan software module (the created overdue notice is not printed on a printer), otherwise you will not be able to create new overdue notices.

Note:

Before printing to a printer it is recommended to check if the paper is correctly inserted (especially for the envelopes).

- **LOAN-ON-02: List of recipients of overdue notices** is a list of members who received an overdue notice. Besides member details, data on material with overdue notice is also displayed. When creating this report enter the date of creating overdue notices. If you enter two different date in the parameter "Date of creating overdue notices", the report will contain all overdue notices created within the selected period. In libraries with departments you can create the report for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

  On overdue notice forms, different types of data can be changed; for this reason, a library can customize the content and to some extent also the form of the forms according to the needs of the library. You can

find more information on the options of creating overdue notice forms in chapter *8.5*.

B   LOAN STATISTICS

Loan statistics are created and printed within the COBISS3/Loan software module. The report layout is predefined. However, you can change the content by entering individual parameters when you prepare the report. You can choose one of the following pre-prepared statistical reports:

- LOAN-STA-Mt01: Loan – by type of material/active months
- LOAN-STA-Mt02: Loan – by type of material/months
- LOAN-STA-Mt03: Loan – by type of material (physical form)/months
- LOAN-STA-Mt04: Loan – by UDC (main)/language/active months
- LOAN-STA-Mt05: Loan – by UDC (main)/language/months
- LOAN-STA-Mt06: Loan – by type of material/member category (school libraries)
- LOAN-STA-Mt07: Loan – by class/active months
- LOAN-STA-Mt08: Loan – by UDC (detailed)/language/active months
- LOAN-STA-Mt09: Loan – by UDC (main)/intended purpose/languages/active months
- LOAN-STA-Mt10: Loan – by material ratio/member category
- LOAN-STA-Mb01: Visits by members – by member category/months
- LOAN-STA-Mb02: Visits by members – by member category/days
- LOAN-STA-Mb03: Active members – by member category (school libraries)
- LOAN-STA-Mb04: Visits by members – by class/months
- LOAN-STA-Mb05: Visit by members – by class/day
- LOAN-STA-Mb06: Active members – by member category
- LOAN-STA-Mb07: Active members – by municipality/member category
- LOAN-STA-Mb08: Visit by members – municipality/member category
- LOAN-STA-T01: Transactions – by member category/months
- LOAN-STA-T02: Transactions – by member category/days
- LOAN-STA-T03: Transactions – by municipality/member category

Subchapters:

- Creating and printing statistical reports
- Description of statistical reports

B.2   DESCRIPTION OF STATISTICAL REPORTS

Statistical reports are created on the basis of data on the transactions that are entered by using the COBISS3/Loan software module.

> Note:
>
> *For certain statistics, the input parameter »Username« can be used. A default code list of non-personal usernames, where you can select non-personal usernames, is available. To access the expanded code list, which contains also personal usernames, the special privilege* RPT_USER – activation of expanded username code list *is required. In the COBISS3/Reports software module, the expanded username code list will be displayed if the* **Home library / Expand username code list for reports** *method is used in the COBISS3/Loan software module. If you wish for the local code list of non-personal name to appear again, use the same method again. It is recommended to set a time limit to access the expanded username code list.*

B.2.1   LOAN-STA-Mt01: Loan - by type of material/active months

The report contains the statistics on the loan for selected period of time, where the number of copies on loan is arranged according to the type of material. The report only contains columns for those months when the material was put on loan (i.e. active months). Under the input parameter "Transaction", all transactions[1] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[2]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating the statistics.

In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

---

[1] The following transactions are taken into account: outside loan, reading room loan, loan renewal, change of due date, reading room transaction, renewal via COBISS/OPAC.

[2] Under the username *EbookService*, all transactions in online COBISS/OPAC are recorded also in the mCOBISS application.

A username for the self-checkout applies only to libraries with the technical equipment which operates under a special username, e.g. self-checkout, FRID-readers, etc.

B.2.2   LOAN-STA-Mt02: Loan - by type of material/months

The report contains the statistics on loan for the selected period of time, where the number of copies on loan is arranged according to the type of material. The report contains columns for all months, regardless of whether the material was put on loan or not. Under the input parameter "Transaction", all transactions[3] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[4]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

B.2.3   LOAN-STA-Mt03: Loan - by type of material (physical form)/months

The report contains the statistics on loan depending on the type of material. The data on the number of copies of material on loan is sorted according to the NBM_1 table (see *COBISS2/Reports* User Manual, chapter *11.3.1*). Under the input parameter "Transaction", all transactions[5] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[6]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. The data on the selected time period is organised by individual months. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

---

[3] Idem.
[4] Idem.
[5] Idem.
[6] Idem.

B.2.4   LOAN-STA-Mt04: Loan - by UDC (main)/ language/active months

The report contains the statistics on loan for the selected time period. The data on the number of copies of material on loan is sorted by the language of the material (domestic and others) for the defined main UDC codes (the local code list *UDC for statistics (CODE 85)* is taken into account). The report only contains columns for those months when the material was put on loan (i.e. active months). Under the input parameter "Transaction", all transactions[7] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[8]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

B.2.5   LOAN-STA-Mt05: Loan - by UDC (main)/language/months

The report contains the statistics on loan for the selected time period. The data on the number of copies of material on loan is sorted by the language (domestic or others) of the material for the defined main UDC codes (the local code list *UDC for statistics (CODE 85)* is taken into account). The report contains columns for all months, regardless of whether the material was put on loan or not. Under the input parameter "Transaction", all transactions[9] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[10]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

---

[7] Idem.

[8] Idem.

[9] Idem.

[10] Idem.

B.2.6   LOAN-STA-Mt06: Loan – by type of material/member category (school libraries)

The report contains the statistics on loan for the selected time period. The data on the number of copies of material on loan are sorted by groups depending on type of material: *Books –total, Books – fiction, Serials* and *Non-book material.* The data in columns is sorted depending on groups of members in school libraries: *Pupils, Students* and *Others.* Under the input parameter "Transaction", all transactions[11] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[12]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

B.2.7   LOAN-STA-MT07: Loan –by class/active months

The report contains the statistics on loan for the selected time period. The data on the number of copies of material borrowed by the members is sorted by classes. The report only contains columns for those months when the material was put on loan (i.e. active months). Under the input parameter "Transaction", all transactions[13] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[14]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

---

[11] Idem.
[12] Idem.
[13] Idem.
[14] Idem.

B.2.8   LOAN-STA-Mt08: Loan – by UDC (detailed)/language/active months

The report contains loan statistics for the selected time period, where data on the number of items on loan is sorted by language of the material (domestic and others) for defined detailed UDC (the local code list UDC for statistics (CODE 85) is taken into account)). The report contains column only for those months when the material was put on loan (active months). Under the input parameter "Transaction", all transactions[15] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[16]: *EBookService, OPAC, self-checkout, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

B.2.9   LOAN-STA-Mt09: Loan – by UDC (main)/intended purpose/language/active months

The report contains loan statistics for the selected time period, where data on the number of items on loan is sorted by different languages and intended purpose of the material (*adults* and *youth*) for defined detailed UDC (the local code list *UDC for statistics (CODE 85)* is taken into account)). The report contains column only for those months when the material was put on loan (active months). Under the input parameter "Transaction", all transactions[17] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[18]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

---

[15] Idem.
[16] Idem.
[17] Idem.
[18] Idem.

B.2.10   LOAN-STA-Mt10: Loan – by material ratio/member category

The report contains loan statistics for the selected time period, where data on the number of items on loan is sorted by the ratio of fiction and non-fiction material (the local code list *UDC for statistics (CODE 85)* is taken into account)). In columns, data is sorted by member groups: youth (pre-school children and primary school pupils) and adults (other member categories). Under the input parameter "Transaction", all transactions[19] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[20]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

B.2.11   LOAN-STA-Mb01: Visits by members – by member category/months

The report contains the statistics on the number of visits by members for the selected time period. A visit is every transaction[21] that is recorded in the library in the same department within a certain period of time. The default value is 60 minutes. In library with departments, visits are recorded separately by departments. If a member visited two library departments within 60 minutes, it will be considered as two visits when preparing the statistics on visits. You can create a list for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments. The data on the number of visits is sorted by the member category by months.

---

[19] Idem.

[20] Idem.

[21] The following transactions will be taken into account: new member, change of member data, change of membership card number, outside loan, reading room loan, reserving currently unavailable material, reserving available material, loan renewal, change of due date, return of material, start of routing, end of routing, visit by member and non-member, entered by using the Enter visit method.

B.2.12 LOAN-STA-Mb02: Visits by members – by member category/days

The report contains the statistics on the number of visits by members for the selected time period. Every transaction[22] that is recorded in the library in the same department within a certain period of time is considered a visit. The default value is 60 minutes. In library with departments, visits are recorded separately by departments. If a member visited two library departments within 60 minutes, it will be considered as two visits when preparing the statistics on visits. You can create a list for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments. The data on the number of visits is organised by the member category by days.

Tip:

Upon the library's request, a special parameter can be used to set a different time period that is taken into account as a member's visit. A shorter period (30 minutes) is recommended only for school libraries as one member can visit the library during two consecutive breaks between which the time period is less than one school period (45 minutes).

B.2.13 LOAN-STA-Mb03: Active members – by member category (school libraries)

The report contains the statistics on active members in library for the selected time period. Active members are members who visited the library at least once in the selected time period. Data on the number of visits is sorted by member groups in school libraries: *Pupils or students, Students* and *Others*. Under the input parameter "Transaction", all transactions[23] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[24]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

---

[22] Idem.

[23] Idem.

[24] Idem.

B.2.14 LOAN-STA-Mb04: Visits by members – by class/months

The report contains the statistics on the number of visits by members for the selected time period. Every transaction[25] that is recorded in the library in the same department within a certain period of time is considered a visit. The default value is 60 minutes. In library with departments the visits are counted separately by departments. Thus, if a member visited two library departments within 60 minutes, it will be considered as two visits when preparing the statistics on visits. You can create a list for individual department by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments. The data on the number of visit by members is sorted depending on their class by individual months.

B.2.15 LOAN-STA-Mb05: Visit by members –by class/day

The report contains the statistics on the number of visits by members for the selected time period. Every transaction[26] that is recorded in the same department within a certain period of time is considered a visit. The default value is 60 minutes. In library with departments the visits are counted separately by departments. If a member visited two library departments within 60 minutes, it will be considered as two visits when preparing the statistics on visits. You can create a list for individual department by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments. The data on the number of visit by members is sorted depending on their class by individual days.

B.2.16 LOAN-STA-Mb06: Active members – by member category

The report contains statistics on active members in the library for the selected time period. Active members are members who visited the library at least once in the selected period. Data on the number of visits are sorted by member category. Unlike the LOAN-STA-Mb03 statistics, where data on active members are sorted by member groups in school libraries (*Pupils or students*, *Students* and *Others*), in the LOAN-STA-Mb06 statistics, data is sorted by individual member categories. Under the input parameter "Transaction", all transactions[27] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of

---

[25] Idem.
[26] Idem.
[27] Idem.

material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[28]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments. In libraries with departments you can create a report for an individual department by entering the "Library department" parameter.

B.2.17   LOAN-STA-Mb07: Active members – by municipality/member category

The report contains statistics on active members in the library for the selected time period. Active members are members who visited the library at least once in the selected period. Data on the number of visits are sorted by an individual municipality and by member category. Under the input parameter "Transaction", all transactions[29] that are taken into account as the loan of material, are set as default. If necessary, a different set of transactions involving the loan of material for which you wish to create loan statistics can be selected. The input parameter "Username", where an empty value is set as default, is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[30]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments. In libraries with departments you can create a report for an individual department by entering the "Library department" parameter.

B.2.18   LOAN-STA-Mb08: Visit by members – by municipality/member category

The report contains the statistics on the number of visits by members for the selected time period. Every transaction[31] that is recorded in the same department within a certain period of time is considered a visit. The default value is 60 minutes. In library with departments, visits are recorded separately by departments. If a member visited two library departments within 60 minutes, it will be considered as two visits when preparing the statistics on

---

[28] Idem.
[29] Idem.
[30] Idem.
[31] Idem.

visits. You can create a list for individual department by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments. The data on the number of visit by members is sorted depending on their class by individual days.

B.2.19   LOAN-STA-T01: Transactions – by member category/months

The report contains statistics on transactions recorded when updating member's details or during the procedures related to material (e.g. loan, reservation etc.) for the selected time period. Unlike the statistics LOAN-STA-Mb01, LOAN-STA-Mb02, LOAN-STA-Mb04, LOAN-STA-Mb05, and LOAN-STA-Mb08, the statistics LOAN-STA-T01 includes *all* transactions for the same member for the selected period regardless of whether they were recorded within 60 minutes or more in a library or via COBISS/OPAC. Data on the number of transactions are sorted according to member category by months. Therefore, it is recommended to select one of the transactions related to members in the parameter "Transaction". The input parameter "Username", where an empty value is set as default, is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[32]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create the statistical report on transactions for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

B.2.20   LOAN-STA-T02: Transactions – by member category/days

The report contains statistics on transactions recorded when updating member's details or during the procedures related to material (e.g. loan, reservation etc.) within the selected time period. Unlike the statistics LOAN-STA-Mb01, LOAN-STA-Mb02, LOAN-STA-Mb04, LOAN-STA-Mb05, and LOAN-STA-Mb08, the statistics LOAN-STA-T01 includes *all* transactions for the same member within the selected period regardless of whether they were recorded within 60 minutes or more in a library or via COBISS/OPAC. Data on the number of transactions are sorted according to the member category by days. Therefore, it is recommended to select one of the transactions related to members in the parameter "Transaction". The input parameter "Username", where an empty value is set as default, is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[33]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the

---

[32] Idem.
[33] Idem.

input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create the statistical report on transactions for individual departments by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

B.2.21 LOAN-STA-T02: Transactions – by municipality/member category

The report contains statistics on transactions recorded when updating member's details or during the procedures related to material (e.g. loan, reservation etc.) for the selected time period. Unlike the statistics LOAN-STA-Mb01, LOAN-STA-Mb02, LOAN-STA-Mb04, LOAN-STA-Mb05, and LOAN-STA-Mb08, the statistics LOAN-STA-T01 includes **all** transactions for the same member for the selected period regardless of whether they were recorded within 60 minutes or more in a library or via COBISS/OPAC. Data on the number of transactions are sorted according to the member's municipality of permanent address by individual member categories. Therefore, it is recommended to select one of the transactions related to members in the parameter "Transaction". The input parameter "Username", where an empty value is set as default, is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames[34]: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. In libraries with departments you can create the statistical report on transactions for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

---

[34] Idem.