

COBISS[®]

Co-operative Online Bibliographic System & Services

COBISS3/Loan

V6.3-00

User Manual

Institute of Information Science, Maribor, Slovenia

IZUM[®]

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The manual includes all updates from the first published printed version of the manual in November 2007 until the present day. The contents of the manual correspond to the V6.1-03 version of COBISS3 software, and are also valid for all future software versions until they are withdrawn or another electronic version is published.

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CONTENTS

PREFACE	PREFACE-1
ABOUT THE MANUAL	ABOUT THE MANUAL-1
1 INTRODUCTION	1-1
2 SETTING UP PARAMETERS	2-1
2.1 Time parameters.....	2.1-1
2.1.1 Loan period expiry date for textbook fund.....	2.1-3
2.2 Calendar.....	2.2-1
2.3 Loan type (pq table).....	2.3-1
2.4 Electronic notification.....	2.4-1
2.4.1 Notification types	2.4-1
2.4.2 Creating and sending general notifications.....	2.4-2
2.5 Contact details and information for COBISS/OPAC.....	2.5-1
2.6 Restrictions on operations.....	2.6-1
3 MEMBERS	3-1
3.1 Registering a new member.....	3.1-1
3.1.1 Defining a membership card number	3.1-1
3.1.1.1 Entering membership card number manually	3.1-2
3.1.1.2 Entering membership card number automatically.....	3.1-2
3.1.2 Entering data on the member.....	3.1-2
3.1.2.1 Entering general data.....	3.1-3
3.1.2.1.1 Entering addresses	3.1-7
3.1.2.1.2 Entering addresses for e-notification	3.1-7
3.1.2.1.3 Entering alternative or invalid identification numbers	3.1-8
3.1.2.1.4 Entering the COBISS/OPAC password	3.1-8
3.1.2.2 Entering data on schooling and employment	3.1-8
3.1.2.2.1 Entering data on schooling in the eVŠ system.....	3.1-7
3.1.2.3 Entering membership data.....	3.1-9
3.1.2.4 Data on member conduct.....	3.1-10
3.1.2.5 Transferring member details from the reference students database	3.1-10
3.1.3 Defining a superior member	3.1-11
3.1.3.1 Family card.....	3.1-11
3.1.3.2 Legal entity card.....	3.1-12
3.2 Editing data.....	3.2-1
3.3 Deleting member details	3.3-1
3.4 Printing a label for the membership card.....	3.4-1
3.5 Changing the membership card number	3.5-1
3.6 Finding a member	3.6-1
3.7 Changing class or grade.....	3.7-1
3.8 Batch deletion of data on inactive members	3.8-1
3.8.1 Batch deletion of data on all inactive members.....	3.8-1
3.8.2 Batch deletion of data on selected inactive members	3.8-4
3.9 Reference students database	3.9-1
3.9.1 Structure of the file with data on students	3.9-1

3.9.1.1	Converting Excel file with data on students into text file	3.9-2
3.9.2	Preparing the database	3.9-3
3.9.2	Deleting the database	3.9-4
3.9.4	Updating data on entered members - students with data from the reference students database	3.9-4
3.10	Entering a visit	3.9-1

4 HOME LIBRARY MATERIAL 4-1

4.1	Selecting a member	4.1-1
4.2	Home library material editor	4.2-1
4.3	Outside loan	4.3-1
4.3.1	Lending by entering the item's ID number	4.3-2
4.3.1.1	Lending serials	4.3-3
4.3.2	Loan with selection from catalogue	4.3-3
4.3.3	Interdepartmental loan	4.3-4
4.3.3.1	Interdepartmental loan from the department without computerised loan....	4.3-6
4.3.3.2	Interdepartmental return of material to the department without computerised loan.....	4.3-7
4.4	Reading room loan	4.4-1
4.4.1	Entering transaction with material in reading room	4.5-2
4.5	Returning material.....	4.5-1
4.5.1	Returning material without selecting the member	4.5-2
4.5.1.1	Returning serials.....	4.5-3
4.5.2	Returning material with member selection.....	4.5-3
4.5.2.1	Returning material by entering the item's ID number	4.5-3
4.5.2.1.1	Returning serials	4.5-3
4.5.2.2	Returning material by selecting it from a list	4.5-4
4.5.2.3	Returning material with restriction.....	4.5-4
4.5.2.4	Returning material in any department	4.5-4
4.6	Loan renewal.....	4.6-1
4.7	Changing the due date.....	4.7-1
4.8	Entering notes on material	4.8-1
4.8.1	Entering a temporary note.....	4.8-1
4.8.2	Entering a note on item.....	4.8-1
4.9	Printing lending forms	4.9-1
4.9.1	Creating lending forms and invoices	4.9-1
4.9.1.1	Creating new forms	4.9-2
4.9.1.1.1	Editing data on lending forms and invoices	4.9-11
4.9.1.2	Editing forms.....	4.9-11
4.9.1.3	Activating forms.....	4.9-12
4.9.1.4	Deleting forms.....	4.9-12
4.10	Displaying a record in the COMARC format	4.10-1
4.11	Viewing the library material status	4.11-1
4.12	Catalogue	4.12-1
4.12.1	Searching for material in catalogue	4.12-2
4.12.2	Displaying data in the catalogue	4.12-2
4.13	Reserving material	4.13-1
4.13.1	Reservations of available material	4.13-4

4.13.1.1	Preparing reserved material for collection	4.13-5
4.13.1.2	Printing slip with reservation details	4.13-6
4.13.2	Reservations of unavailable material.....	4.13-8
4.13.2.1	Editing list of reservations.....	4.13-8
4.13.3	Processing reservations.....	4.13-9
4.13.4	Batch deletion of reservations whose validity period expired	4.13-10
4.14	Routing lists for serials	4.14-1
4.14.1	Setting up routing lists for serials	4.14-1
4.14.2	Deleting routing lists	4.14-2
4.14.3	Preparing a new routing list.....	4.14-2
4.14.4	Sending an issue for routing	4.14-3
4.14.5	Routing with returning each time to library	4.14-4
4.14.6	Recording the end of routing	4.14-4
4.14.7	Cancelling routing	4.14-5
4.14.8	Routing lists and notifications about routing period expiry dates	4.14-6
4.15	Entering the loss of material	4.15-1
4.16	Keeping records on the loan of sets	4.16-1
4.16.1	Loan of a set	4.16-2
4.16.2	Return of a set.....	4.16-2
4.16.2.1	Return of an incomplete set.....	4.16-4
4.16.2.1.1	A member forgets a set item at home.....	4.16-4
4.16.2.1.2	A member returns a damaged set	4.16-4
4.16.2.1.3	A member returns a set with one or several items lost.....	4.16-5
4.16.2.2	Returning the set with restriction	4.16-6
4.16.2.3	Entering the loss of a set	4.16-7
4.16.3	Loan renewal	4.16-8
4.16.4	Change of status expiry date.....	4.16-8
4.16.5	Sets in the catalogue	4.16-9
4.16.6	Reserving sets.....	4.16-9
4.16.6.1	Reserving available sets	4.16-9
4.16.6.2	Reserving unavailable sets	4.16-10
4.16.6.3	Reserving a set for reading room use	4.16-10
4.16.6.4	creating a list of reserved sets	4.16-10
4.16.6.5	Preparing reserved sets for collection	4.16-10
4.16.6.6	Batch deletion of set reservations whose validity period has expired	4.16-11
4.16.7	Insight into the library material status	4.16-11
4.16.8	Overdue notices	4.16-11
4.17	Loan in mobile library	4.17-1
4.17.1	Special settings	4.17-1
4.17.2	Selection of mobile library stop.....	4.17-2
4.17.3	Entering material transfer to and from mobile library.....	4.17-2
4.17.3.1	Entering material delivered from library to mobile library.....	4.17-2
4.17.3.2	Deleting material from the mobile library records.....	4.17-4
4.17.4	Entering loan procedures when working online in COBISS3/Loan is not possible	4.17-5
4.17.4.1	User settings.....	4.17-5
4.17.4.2	Entering loan procedures.....	4.17-6
4.17.4.3	Transferring entered transactions to the COBISS3/Loan software module.....	4.17-9
5	COUNTERS.....	5-1

6	SETTING UP THE DATE OF PROCEDURES	6-1
7	CASH REGISTER OPERATIONS.....	7-1
7.1	Managing price list.....	7.1-1
7.1.1	Entering price list.....	7.1-1
7.1.1.1	Selecting group of services or debts.....	7.1-2
7.1.1.2	Entering and editing services or debts.....	7.1-3
7.1.1.3	Copying to prepared price list	7.1-4
7.1.2	Editing price list.....	7.1-4
7.1.3	Defining price list validity	7.1-4
7.1.4	Deleting price list.....	7.1-5
7.2	Entering debts	7.2-1
7.2.1	Entering debts manually	7.2-1
7.2.2	Entering debts automatically	7.2-2
7.2.2.1	Membership or admission fee	7.2-2
7.2.2.1.1	Individual membership fee.....	7.2-4
7.2.2.2	Fine.....	7.2-5
7.2.2.3	Notification about available reserved material.....	7.2-6
7.2.2.4	Costs of overdue notices.....	7.2-7
7.2.2.5	Loan fee or wear and tear fee	7.2-7
7.2.2.6	Cost of reservation of available material.....	7.2-8
7.2.2.7	Costs of uncollected reserved material.....	7.2-9
7.2.2.8	Cost of issuing a new membership card.....	7.2-9
7.3	Settling debts and printing invoices	7.3-1
7.3.1	Settling debts for non-members.....	7.2-3
7.4	Overview of debts	7.4-1
7.5	Deleting debts	7.5-1
7.6	Cancelling debt settlement.....	7.6-1
7.7	Closing out cash register and printing list of invoices	7.7-1
7.8	Overview of cash register transactions	7.8-1
8	OVERDUE NOTICES.....	8-1
8.1	Creating overdue notices.....	8.1-1
8.2	Printing overdue notices.....	8.2-1
8.3	Cancelling creation of overdue notices	8.3-1
8.4	Deleting individual overdue notice	8.4-1
8.5	Creating overdue notice forms	8.5-1
8.5.1	Creating new forms.....	8.5-2
8.5.1.1	Editing data on overdue notice forms.....	8.5-10
8.5.1.1.1	Language versions of overdue notices	8.5-11
8.5.2	Editing forms	8.5-11
8.5.3	Activating forms	8.5-12
8.5.4	Deleting forms	8.5-13
9	CONNECTION TO OTHER SOFTWARE MODULES AND THE LOCAL DATABASE.....	9-1
9.1	COBISS3/Holdings.....	9.1-1
9.2	COBISS3/Interlibrary loan.....	9.2-1
9.3	COBISS3/Reports	9.3-1
9.4	COBISS3/Application administration.....	9.4-1
9.5	Local database.....	9.5-1

9.6 COBISS/OPAC.....	9.6-1
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Appendices

A REPORTS.....	APPENDIX A-1
A.1 Creating and printing statistical reports	Appendix A.1-1
A.1.1 Creating and printing scheduled reports	Appendix A.1-1
A.2 Groups and report description.....	Appendix A.2-1
A.2.1 Members	Appendix A.2-1
A.2.2 Material.....	Appendix A.2-2
A.2.3 Members and material	Appendix A.2-3
A.2.4 Transactions.....	Appendix A.2-4
A.2.5 Cash register operations.....	Appendix A.2-5
A.2.6 Overdue notices	Appendix A.2-6
A.2.7 Data export	Appendix A.2-7
B LOAN STATISTICS.....	APPENDIX B-1
B.1 Creating and printing statistical reports	Appendix B.1-1
B.2 Description of statistical reports	Appendix B.2-1
B.2.1 LOAN-STA-Mt01: Loan - by type of material/active months	Appendix B.2-1
B.2.2 LOAN-STA-Mt02: Loan - by type of material/months.....	Appendix B.2-2
B.2.3 LOAN-STA-Mt03: Loan - by type of material (physical form)/ months.....	Appendix B.2-2
B.2.4 LOAN-STA-Mt04: Loan - by UDC/language/active months.....	Appendix B.2-3
B.2.5 LOAN-STA-Mt05: Loan - by UDC/language/months	Appendix B.2-3
B.2.6 LOAN-STA-Mt06: Loan – by type of material/member category (school libraries)	Appendix B.2-4
B.2.7 LOAN-STA-MT07: Loan –by class/active months	Appendix B.2-4
B.2.8 LOAN-STA-Mb08: Loan – by UDC (detailed)/language/active months.	Appendix B.2-5
B.2.9 LOAN-STA-Mb09: Loan – by UDC (main)/intended purpose/languages/active months	Appendix B.2-5
B.2.10 LOAN-STA-Mb10: Loan – by material ratio/member category	Appendix B.2-6
B.2.11 LOAN-STA-Mb11: Loan – by mobile library stops/member category/active months	Appendix B.2-6
B.2.12 LOAN-STA-Mb01: Visits by members – by member category/months..	Appendix B.2-6
B.2.13 LOAN-STA-Mb02: Visits by members – by member category/days	Appendix B.2-7
B.2.14 LOAN-STA-Mb03: Active members – by member category (school libraries)	Appendix B.2-7
B.2.15 LOAN-STA-Mb04: Visits by members – by class/months.....	Appendix B.2-8
B.2.16 LOAN-STA-Mb05: Visit by members –by class/day	Appendix B.2-8
B.2.17 LOAN-STA-Mb06: Active members –by member category	Appendix B.2-8
B.2.18 LOAN-STA-Mb07: Active members – by municipality/member category	Appendix B.2-9
B.2.19 LOAN-STA-Mb08: Visits by members – by municipality/member category	Appendix B.2-9
B.2.20 LOAN-STA-Mb09: Active members – by mobile library stops/member category	Appendix B.2-10

B.2.21 LOAN-STA-Mb10: Visits by members – by mobile library stops/member category	Appendix B.2-11
B.2.22 LOAN-STA-T01: Transactions – by member category/months.....	Appendix B.2-11
B.2.23 LOAN-STA-T02: Transactions – by member category/days	Appendix B.2-12
B.2.24 LOAN-STA-T03: Transactions – by municipality/member category	Appendix B.2-12

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.

General notifications via e-mail, SMS notifications and push notifications will be sent immediately when you confirm the selected members in the search window. If you wish to check the notification before distributing it, send a notification as a test to your destination.

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.*

4.2 HOME LIBRARY MATERIAL EDITOR

The data on the member is displayed in the top part of the **Home library material** window:

- membership card number
- member's name and surname
- member category



Tip:

Upon the library's request, it is possible to display the attribute values "Class/grade" and "Course of study" or "Department of employment" instead of the member category.

- total of outstanding debts (in libraries which use cash register)
- limitation of number of copies (items) on loan
- restriction on loan renewal
- restrictions
- privileges
- note
- number of items currently on loan (outside loan , reading room loan or interlibrary loan) to member



Note:


In libraries with departments the number of items currently on loan is displayed for the member for the department in which you are signed in as a user.

- membership expiry date (if the membership has expired, the date is displayed in red)
- date of last visit (if more than one year passed from the last visit, the date is displayed in red)
- note indicators
 - *LST – lost material is recorded for the member*
 - *OVR – the member has an overdue notice recorded for the material on loan*
 - *OLD – the member has already received an overdue notice*
 - *SPM – a special membership is recorded for the library member*

- *CIR – material is entered for the member in at least one library department that is different from the login department*



Tip:

To access the member details editor from the **Home library material** window, click the  icon.

In the central part of the **Home library material** window, a list of materials will be displayed that are recorded for the member. In libraries with departments, a list of material recorded in the department in which you are signed in as a user is displayed for the member.

If a library uses the COBISS3/Interlibrary loan software module and can lend material from its library collections to its members also through interlibrary loan, the home library material, which you reserved or lent for a member through interlibrary loan, will be displayed in the list of recorded material. In libraries with departments, the data on material borrowed through interlibrary loan will be displayed when you are logged in to a department that performs interlibrary loan (i.e. **ILL department**).



Tip:

In libraries with department you can see the material which is recorded for the member in other departments by finding the member and clicking the **Home library material** folder in the related objects. A table containing the recorded items will open. You can sort the items by departments by clicking "Transaction department".



Tip:

If you wish to record a transaction for the member in a library with departments (e.g. to put material on loan), it is possible to change the department you are signed in to by clicking the **Department** button in the **Home library material** window.



Tip:

If you enter loan procedures in the mobile library, you can select the mobile library stop of your current location from the drop-down list (see also chapter 4.17.2).

The data on individual items of material is displayed in three rows on the list of material and is divided into the following columns:

1st column

- the item status, which can be one of the following:
 - *C(irculate) – the item is on outside loan*

- *S(tudy room)* – the item is on loan in the reading room
 - *M* – the item is borrowed through interlibrary loan
 - *R(eserve)* – material is reserved
 - *W(aiting)* – the item was returned to the library and is on hold for the library member who reserved it
 - *L(ost)* – the item is recorded as lost
 - *O(rder)* – the item is reserved and available
 - *B(ack)* – the item is returned, but is still recorded for the library member because of possible claims
 - *D* – the item is on loan to another department
 - *K* – the item is on loan for routing
 - *U* – the item is reserved for reading room use
- note on item
 - temporary note

2nd column

- material ID

Accession number is displayed for monographs on loan or reserved monographs. Accession number is followed by issue number, i.e. a range of issue numbers bound together for serials on loan or reserved serials in several issues. COBISS.SI-ID is displayed for reserved unavailable monographs followed by volume designation (996d\|x) for multi-volume material and by physical form designation (996g\|o) for material in different physical forms. For material that is put on loan as a set, the number of the set, the number of the individual set item and the number of all set items (subfield 996/997c) is displayed after the accession number.
- type of material
- the type of material that was taken into account when put on loan or reserved, if it is different from the type of material in terms of physical form (in the case of multi-type material that is put on loan as a set)

3rd column

- description of material

In case of monographs, the following data is displayed: title, author, call number; in case of serials title, call number, copy identifier (997c), volume (997j), year (997k), third level of enumeration (997l), ISSN.

4th column

- item's parent department

For items that are on interdepartmental loan, the numeric code of the department that sent the material available for loan to the member is displayed.

5th column

- date of loan of the item (in case of outside loan, reading room loan and interdepartmental loan)
- dates of renewal (date of last renewal first)
- date of last change of the return date

6th column

- date of reservation of unavailable material, date of reservation of available item, date of allocating reserved material to the member, date of recording the loss, date of return with restriction

After allocating the material to the member the date of reservation is displayed in the 2nd column.

After returning the item that was reserved for reading room loan the date of last reservation will be displayed in the 3rd row.

7th column

- loan expiry date, reservation validity expiry date
- date of last overdue notice receipt



Note:

The loan period expiry date, if before the current date, will be displayed in red.

8th column

- number of days of delay

**Tip:**

On library's request it is possible to set up a special parameter which excludes non-working days defined in the calendar in case of delay.

The number of days of delay is displayed in red if different number of days of delay are taken into account due to parameter settings when automatically recording the fine. In that case the text *according to price list* is displayed as a screen tip before the number of days.

Parameters settings affecting the number of days of delay used to calculate the fine:

- restricted number of days of delay for which the fine will be calculated (daily fine increases until a certain number of days has been reached)
- the fine is not calculated during the fine grace period defined in the table of time parameters
- the fine is not calculated for the period when the price was not defined in the valid price list
- the fine is calculated only until the date of receipt of the 3rd overdue notice

- number of last received overdue notice
- current number of an item in the list of recorded material

Procedures

The buttons in the **Home library material** window give access to the following procedures:

- **Catalogue** – accessing the local catalogue of material, where you can search for, view and select material for loan from the local database in order to put it on loan or reserve it
- **View** – insight into the library material status; for material on loan you can get the information if the material is reserved by other members and for material which is reserved by the member you can get the information who borrowed the material, when you can expect the material to be returned and at which place of the list of reservations the member is
- **COMARC** – displaying a bibliographic record with all fields 996/997 in the COMARC format; individual data can be copied and pasted to the desired place in the editor
- **Lend** – lending the item for outside loan or interdepartmental loan, if the **Outside loan** radio button is selected; or reading room loan if the **Reading room loan** radio button is selected; enter the item's identification number (accession number or loan number) to "AN/LN="

**Tip:**

At the request of the library which borrows the material only to the reading room a special parameter can be used to define the **Reading room loan** radio button as default.

- **Return** – returning the item from outside loan, reading room loan or interdepartmental loan and deleting reservations; before clicking the button, enter the item's identification number (accession number or loan number) to "AN/LN=" or highlight the item on the list; it is possible to delete the reservation of currently unavailable monographs (ID number is COBISS.SI-ID) only by selecting the material from the list
- **Retain** – returning with restriction; before clicking the button, enter the item identification number (accession number or loan number) under "AN/LN=" or highlight the item on the list
- **Renew** – renewing the loan period; before clicking the button highlight the item on the list

**Tip:**

To select all the copies on the list for renewal or return, click the **Select all** button.

**Note:**

*For material that was reserved or borrowed through interlibrary loan in the **Home library material** window, it is not possible to renew loan period, change the expiry validity date, record return or delete reservation of the material.*



- **Reserve** – reserving available and unavailable material from the local database; before you click the button, enter the identification number of the item (accession number or loan number) under "IN/CN="; for reading room reservation, select the **Reading room** radio button
- **Lending form** – printing the list of entered material to printer

**Tip:**

If you click the **Lending form** button and press the <Ctrl> key at the same time, you can change the content of the lending form or destination, to which the lending form will be sent. This depends on the settings for lending forms and invoices, which can be edited by using the **Home library / Create lending forms and invoices** method (see chapter 4.9.1).



Tip:

To search through the list of recorded material, use the  (**Find**) button or the  (**Find next**) button.



Tip:

The following procedures can also be performed by using a combination of keys:

<Alt> + <I> = Lend

<Alt> + <V> = Return

<Alt> + <A> = Retain

<Alt> + <P> = Renew

<Alt> + <R> = Reserve

<Alt> + <K> = Catalogue

<Alt> + <G> = View

<Alt> + <C> = COMARC

<Alt> + <D> = Lending form

<Alt> + <Z> or <Esc> = Close

<Alt> + <E> =  (member editor)

If the letter on the button with the name of the method is underlined, then the procedure can be performed by using the combination of the key of that letter and the <Alt> key. To get to the list of material for a member from the window for entering the accession number, use <Shift> + <Tab> key combination; to move within the list, use the keys <up> and <down>.



Tip:

To copy the accession number of an item on loan, highlight the item and then press the key combinations <Ctrl> + <C> and <Ctrl> + <V> respectively.



Note:

A library with members or departments that have a lot of items entered can decide to turn on a special parameter that will enable data to be refreshed manually when a certain number of entered items is reached.

When transferring to the **Home library material** window, a note will be displayed for members or departments that reached the limit, but the entered items will not be visible. The entered items will appear only when you click the **Refresh data** button that will appear in the upper right corner of the window. When performing transactions with material, the material you entered is not visible; if you wish the refreshed data to be displayed, click the **Refresh data** button.

4.3 OUTSIDE LOAN

There are three 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:

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.

Precondition

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)

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)

**Tip:**

Upon the library's request, a special parameter can be set up, where in the case of unsettled debts in a specified period, a note will be automatically displayed before conditions for loan restrictions are activated.

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

**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.

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:

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.

Precondition

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

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)



Tip:

Upon the library's request, a special parameter can be set up, where in the case of unsettled debts in the specified period, a note will be automatically displayed before conditions for loan restrictions are activated.

- 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.

4.9 PRINTING LENDING FORMS

In the **Home library material** window, you can print out a lending form, i.e. the list of material recorded for the member.

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.

The member can be found by using the library membership card number or by using other data (see chapter 4.1).

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

3. Click the **Lending form** button.

The **Overview and sending of created report** window will open. Use it to send the report to previously defined or changed destinations. The process of preparing and sending a report is described in the COBISS3 Basic Guidelines User Manual (see chapter 4.5).



Note:

In libraries with departments the list of material recorded for the member is printed for the department in which you are signed in as a user.



Note:

If a library uses COBISS3/Interlibrary Loan software module and lends the material from its library collections through interlibrary loan to its members, the material that you reserved for the member or lent to the member through interlibrary loan will also be displayed on the lending form.

Options

You can also print out a lending form by finding the member in the **Member** class and then selecting the **Object / Print** or **Object / Send** method.

4.9.1 Creating lending forms and invoices

Use the procedure to create, edit, archive or delete lending forms and invoices. The form is defined and maintained by the library information service, and the content is defined and maintained by the library. The set lending forms are used when creating lending forms in the **Home library material** window, when you press the **Lending form** button. The set invoices are used when creating an

invoice in the **Debts settlement** window, when you press the **Send** button. If you select a specific setting, a lending form can be sent to a library member's e-mail address.



Note:

If a library has no lending forms and invoices prepared, default lending forms and invoices will be used. Default forms contain general data and texts in the domestic language. Printing lending forms and invoices on the narrow format (thermal printer) is set as default. Default forms cannot be edited or deleted!



Note:

To create lending forms and invoices, the LOAN_EDT – Changing loan parameters privilege is required.



Note:

If a library, before this change, already had a special parameter set up to create lending forms and invoices (e.g. member name and surname, librarian's name and surname, additional data on material, cash amount and change, list of outstanding debts, etc.) in the COBISS3/Loan software module, based on the Loan minutes, the content of lending forms and invoices was already configured by IZUM.

Furthermore, lending forms and invoices were configured for a library if the library already customized variables for a lending form and invoice, by moving a signature and note on lending form from the Standard folder to the User folder and were customized there according to their needs.

Customized forms are called Customized forms (IZUM).

Procedure

1. Highlight the **Home library** class and select the **Create lending forms and invoices** method.

The **Lending forms and invoices** window will open, where data on the currently valid lending forms and invoices will be displayed.

2. Select one of the procedures to continue with maintaining lending forms and invoices:
 - Creating new forms
 - Editing forms
 - Activating forms
 - Deleting forms
3. After clicking the **Select** button, continue the selected procedure or cancel the procedure by clicking the **Exit** button.

4.9.1.1 Creating new forms

You can create a new form group for lending forms and invoices on the basis of default forms or by using forms that were already prepared.

Procedure

1. In the **Lending forms and invoices** window, select the **Create new forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.
The **Create new forms** window will open.
3. In the *Form group* field, enter the name of the new form group and confirm by clicking the **OK** button.

**Note:**

*New form groups are saved in the form of a file; for this reason, the following characters must not be used: <, >, :, ", /, \, |, ?, *.*

The **Form groups** window will open.

**Note:**

When you create lending forms and invoices for the first time, the Form groups window will not open, because no new forms were prepared. In that case, when creating new forms, data from default forms will be used.

4. Select one of the previously prepared form groups for lending forms and invoices that you will use to create new forms.
5. Confirm the selection of the form group by clicking the **OK** button.

The **Edit data on lending forms and invoices window** will open. In the title bar you can see the name of the new form group that you will edit. All the data from the form group that was previously selected will be displayed in the window. The window is divided into three panes.

Individual columns contain:

1st column – Applies to

In libraries with departments, the names of departments with automated loan, for which the data defined on the lending forms and invoices will apply, will be displayed in individual rows. In libraries with no departments, *Home library* will be displayed in the only row.

2nd column – Format

In this column, by clicking the selected cell, a drop-down list will be displayed, where you can select one of the values to define the lending form and invoice format. You can choose one of the following values:

- 0 – narrow format (thermal printer)
- 1 – wide format (A4)

**Note:**

In this column, you must be careful to ensure that the selected format for the relevant printer is set in accordance with the settings of the logical destination (Lending form – Loan) when you are logged in with your username. If you print lending forms and invoices to different printers in different departments under your username, you must, after you log into the COBISS3 software, edit the settings for the relevant printer in the logical destinations.

3rd column – **Destination**

In this column, by clicking the selected cell in the table, a drop-down list will be displayed, where you can select one of the values to define a destination or a combination of destinations to which the lending form should be sent (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). The destination setting does not apply to invoices, as invoices are always sent to printers. You can choose one of the following values:

- 0 – printer
- 1 – printer or e-mail (Ctrl)
- 2 – e-mail
- 3 – printer and e-mail



Note:

Sending a lending form to a member's e-mail address is intended only for lending forms. A lending form that is sent to a member's e-mail address always contains all the material that was entered.

4th column – **Select material**

In this column, by clicking the selected cell, a drop-down list will be displayed, where you select one of the values to determine which material will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). All the material from the login department will be displayed as default. You can select one of the following values:

- 0 – all material
- 1 – all material or selected material (Ctrl)
- 2 – selected material

5th column – **Today's material**

In this column, by clicking the selected cell, a drop-down list will be displayed, where you select one of the values to determine whether all material or only today's material will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). All the material from the login department will be displayed as default. You can select one of the following values:

- 0 – all material

- *1 – all material or today's material (Ctrl)*
- *2 – selected material*

6th column – **All departments**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether material from all departments will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). Only the material from the login department will be displayed as default. You can select one of the following values:

- *0 – department's material*
- *1 – department's material or material from all departments (Ctrl)*
- *2 – material from all departments*

7th column – **Additional data on material**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether an additional data will be displayed on the lending form (by clicking the **Lending form** button or by clicking the <Ctrl> key and the **Lending form** button at the same time). Only the title of the material will be displayed as default; only one additional data can be displayed. You can select one of the following values:

- *0 – no additional data*
- *1 – accession number/issue number*
- *2 – author/data on serial*
- *3 – call number*

8th column – **Outstanding debts**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether a list of outstanding debts for the member will be displayed on the lending form. A lending form without outstanding debts will be displayed as default. You can select one of the following values:

- *0 – no outstanding debts*
- *1 – outstanding debts*

9th column – **Borrowed material (on invoice)**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether a list of borrowed material will also be displayed on the invoice. An invoice without the list of borrowed material will be displayed as default. You can select one of the following values:

- *0 – without borrowed material*

- *1 – with borrowed material*

10th column – **Cash and change (on invoice)**

In this column, by clicking the selected cell, the drop-down list will be displayed, where you select one of the values to determine whether cash and change amount will also be displayed on the invoice. An invoice without cash and change will be displayed as default. You can choose one of the following values:

- *0 – cash and change*
- *1 – without cash and change*

11th column – **Preview**

In this column, numeric values of data used on the lending forms and invoice are displayed in the cell of the table.



Tip:

If you wish to see the content in numeric values, you can use the screen tip. If you place the mouse cursor on the selected cell, types of data that can be used on lending forms or invoices will be displayed. First you will see the content of the values used on default lending forms and invoices.

In the upper right part of the window, select the type of data that you wish to edit from the drop-down list. In the **Preview** column, you can edit one or several types of data. An individual type of data can have several content versions, based on the department where the lending form or invoice was prepared (applies to libraries with departments).

When you first edit the data, default content will be displayed under the selected type of data. An individual content version is marked with a number, based on which the selected content is visible in the **Preview** column.

Positions of individual types of data are displayed as an example on the invoice for the narrow format, which includes a list of material (see figure 4.9-1).

You can choose between four different types of data:

1. **Department under library name**

Data on the library name will be displayed on default lending forms and invoices. Right under the library name, data on *library department* will also be displayed; for this reason, the value is already set accordingly. You can, however, remove this type of data from the content version or add an empty content version if no department name should be displayed. For libraries with no departments, this type of data is irrelevant.

2. **Additional member data**

The *membership card number* and *member name and surname* data already contains the default value, which can be changed by editing the current content version or adding a new one. If you wish only for the *membership card number* data to be displayed, remove the second part

of the selected type of data, or remove both parts of the selected type of data.

3. Note on invoice

The *note on invoice* data already contains the default value, in the place of which the note that was entered when you created the invoice in the **Debts settlement** window under »Note (to be displayed on invoice)« will be displayed. If you wish the note that was entered when creating an invoice not to be displayed on the printed invoice, the value must be removed from the existing content version or a new content version must be added.

4. Additional data at the end of lending form or invoice

This type of data already contains the default text »Lent by«, the variable value for the *librarian's name and surname* data and the default text "*Thank you for visiting our library. We look forward to seeing you again soon.*« You can edit the existing content version or add a new version and change it accordingly.

COBISS Koper - Capodistria, 15.06.2015
17:21

Univerza na Primorskem Universita' del Litorale

Knjižnica TEMENA

Glagoljaška 8

6000Koper - Capodistria

tel.: +386 5 611 75 72

faks: +386 5 611 75 71

e-pošta: temena@upr.si

IŠ za DDV: SI18974961

← 1. Department under library name

0601379 Novak Janez

Fakulteta za management Koper

Datum poteka članstva: 31.10.2015

← 2. Additional member data

RAČUN št. 0600656/2015

obveznost	kol.	cena	znesek
3. opomin	1,0	3,00	3,00
skupaj		EUR	3,00
gotovinsko plačilo		EUR	10,00
vračilo		EUR	7,00

osnova	stopnja DDV	znesek DDV
3,00	Oproščen promet	0,00

Oproščeno plačila davka po 13. točki
prvega odstavka 42. člena ZDDV-1.

Plačilo opomina za knjigo IN=0400003523

← 3. Note on invoice

SEZNAM GRADIVA

Izposojeno gradivo	vrniti do/tip
La Grande Guerre en	22.06.2015/ knj
Matematični priročnik /	29.06.2015/ knj
Fundamentals of	26.07.2015/ knj

Izposojevalec/-ka:

Marko Kušar

Hvala za obisk in nasvidenje!

Urnik knjižnice:

pon-pet: 8.00-18.00

sob: 7.30-13.00

← 4. Additional data at the end of lending form or
invoice

Figure 4.9-1: Example of an invoice with types of data displayed for narrow format (thermal printer)

“Field for editing the selected data type:”, where you can edit the content to be displayed on lending forms and invoices, is at the bottom part of the window. You can save several content versions, and each version will be in its own numbered row. Under the selected type of data, select the content version that you wish to edit. The selected content will be displayed at the bottom part of the window, where you can change it accordingly.



Note:

When editing data, do not use the % character as this character is reserved for entering variable values.

To edit the content of the selected type of data, you can use the following functions or button:

- **Insert variable value**

When editing data on forms, you can use pre-prepared variable values, in the place of which an actual value will be displayed on the lending form or invoice.

You can enter the following variable values:

- member name and surname
- librarian's name and surname
- library department
- membership expiry date
- member's faculty
- membership card number
- note on invoice

- **Save**

Use the **Save** button to save the changed content version.



Tip:

When editing data, you can also use the *Insert variable value* function. By using this function you can turn on the selected variable value in the place of which the actual value will be automatically displayed on the prepared lending form or invoice (*membership expiry date, note on invoice, etc.*).

- **Add**

Use the **Add** button to define new content for the selected type of data.

You can do this by selecting the content version for the selected data type, updating it if necessary, and clicking the **Add** button. For one type of data you can add several content versions; each version will receive its own running number, which cannot be changed. Content versions may not be sorted by order number.

- **Delete**

Use the **Delete** button to permanently delete the selected content version in the upper right part of the window. You can do this by selecting the content version for the selected data type and clicking the **Delete** button.



Note:

If the content version is used in the form group for lending forms and invoices, it cannot be deleted. You will be automatically notified where in the cell in the »Preview« column the content version was used.

- **Up**

Use the **Up** button to move the selected content version in the upper right part of the window for one or several rows up. When moving the content version, its current number does not change as it is related to the content version for the type of data.

- **Down**

Use the **Down** button to move the selected content version in the upper right part of the window for one or several rows down. When moving the content version, its current number does not change as it is related to the content version for the type of data.

The buttons for saving and cancelling the creation of lending forms and invoices:

- **OK**

By clicking the **OK** button you save the existing or newly prepared forms group for lending forms and invoices.

- **Cancel**

By clicking the **Cancel** button you exit the data editor for lending forms and invoices without saving.

4.9.1.1.1 Editing data on lending forms and invoices

You can edit data on lending forms and invoices in the »Preview« column in a table. In individual cells, numerical values for displaying data in the home library or in a specific department (in libraries with departments) are listed. In the **Editing data on lending forms and invoices** window you can edit four types of data.

In each cell there are four numbers, separated by a comma, which represent different types of data on lending forms and invoices. The default values are 1, but the library can change these.

Procedure

1. Use the mouse to highlight the selected cell in the »Preview« column for the home library or for a specific department (in libraries with departments).
2. Then select the desired type of data and the content version for this type of data from the drop-down list in the upper right part of the window. Double-click to confirm the selected content version. The current number of the content version (visible at the beginning of the row) will be transferred to the highlighted cell to the place that is defined for this type of data (e.g. type of data 3. *Note on invoice* in the highlighted cell will be transferred to the place with the current number of the content version).

Continue editing lending forms and invoices in every cell in the home library or in a specific department (in libraries with departments).

3. Save the changes in the form group by clicking the **OK** button.



Tip:

In libraries with departments you can copy the content of an individual cell into other cells in the »Preview« column (e.g. the content of data to be displayed in the first department is the same or similar to all other departments).

You can copy the content by highlighting the selected cell with a mouse and press <Ctrl> + <C>. Then highlight the desired cell or several cells at the same time (e.g. for all departments at the same time) and paste the content by pressing <Ctrl> + <V>. If only one content version for a specific type of data (e.g. 4. *Additional data on the lending form and invoice*) is different, change only this data in the selected cells of an individual department.

4.9.1.2 Editing forms

Select the option of editing lending forms and invoices if you wish to change or update the data in the already created forms.

Procedure

1. In the **Lending forms and invoices** window, select the **Edit forms** radio button.
2. Confirm the selection of the procedure by clicking the **Select** button.

The **Form group** window will open.



Note:

Default lending forms and invoices cannot be edited. If a library has not yet created new forms and the Edit forms procedure is selected, a note that says that default forms cannot be edited will be displayed. New forms must be prepared on the basis of default forms.

3. Select one of the previously prepared form groups for lending forms and invoices and confirm the selection by clicking the **OK** button.

The **Edit data on lending forms and invoices** window will open. In the title bar you can see the name of the form group that you selected for editing.

Continue the procedure of editing forms in the **Edit data on lending forms and invoices** according to instructions (see chapter 4.9.1.1).

4.9.1.3 Activating forms

In a library that does not create lending forms and invoices, default forms are valid. Activating new or already existing form groups for lending forms and invoices can be activated only when all the necessary data for form groups are edited and saved.

Procedure

1. In the **Lending forms and invoices** window, select the **Activate forms** radio button.

2. Confirm the selection of the procedure by clicking the **Select** button.

The **Form group** window will open, where you can select one of the prepared form groups for lending forms and invoices that you wish to activate.

You can also select default lending forms and invoices.

3. Confirm the selection of the form group by clicking the **OK** button.

Currently valid form group will be displayed in the upper part of the **Lending forms and invoices** window.

4.9.1.4 Deleting forms

A library can permanently delete the prepared form groups for lending forms and invoices if they are no longer needed.



Note:

Default lending forms and invoices as well as currently valid lending forms and invoices cannot be deleted. If you select the valid form group, you will automatically receive a notification that you cannot delete it.

Procedure

1. In the **Lending forms and invoices** window, select the **Delete forms** radio button.
2. Confirm the procedure by clicking the **Select** button.
3. The **Form group** window will open, where you select one of the prepared form groups for lending forms and invoices that you wish to permanently delete.

**Note:**

If there is only one form group for lending forms and invoices prepared in a library, you will be automatically asked if you are sure you want to delete the form group.

4. Confirm the selection of the form group by clicking the **OK** button.
Form deletion will be performed only after a question appears on the screen and you confirm the deletion by clicking the **Yes** button. You can cancel the deletion by clicking the **No** button.
5. The selected form group will be deleted and you will be returned to the **Lending forms and invoices** window.

4.13 RESERVING MATERIAL

You can reserve available or unavailable material for the selected member from the local database of the home library, if there are no loan or reservation restrictions that apply to the material. If the member can access the My library service in COBISS/OPAC (has a password and no restrictions), he/she can enter a reservation by him/herself. Upon the member's request it can be done by a librarian in the COBISS3/Loan software module. If the material is not available, after a successful reservation the member is placed on the list of reservations. The member who is on the top of the list gets the material first as he/she reserved the material first.

If your library uses the COBISS3/Interlibrary Loan module, data on the customer (partner or member)¹, for which the home library material has been reserved upon receiving the ILL request, can also be displayed in the list.

When returning the unavailable material, which was reserved also by other members, a notification with reservation details that is at the top of the list of reservations will be displayed. If *reservation for member* (who reserved the material in loan) is at the top of the list, the membership card number and the name and surname of the member will be displayed. If *reservation for interlibrary loan* is at the top of the list, the data on the new customer (partner symbol or a member's name and surname), their ILL request number and the date until which the material will be waiting for collection will be displayed.

In the case of a *reservation for member*, the material is allocated to the member after a successful entering of the return of material, whereby the status of the reserved material will be automatically changed from *R – reserved unavailable material* to *W – waiting on the shelf (reservation)*.

The member will be informed that the material has been received in a way that is provided by the library for this purpose (e-mail, SMS notification, telephone call). The material is placed on the shelf for available reserved material along with a slip which contains details on the member who is the first on the list of reservations.

The reserved available material must be prepared and the member who reserved the material must be notified. Notify the member in a way which he/she chose from available options (e-mail, etc.) and place the material on the shelf for that purpose.



Note:

*If the material is assigned for interlibrary loan and intended for a member, a notification about received reserved material will **not be sent** (by e-mail or SMS notification), even if the member is subscribed to e-notifications about*

¹ The COBISS3 software enables entering interlibrary loan procedures also in libraries that transfer material from their own library collections through interlibrary loan to their members (and not only to libraries and other organizations in Slovenia and abroad).

received reserved material and the member's e-mail address and mobile phone number are entered.

Precondition

General conditions for a reservation are:

- a reservation can be entered only for a member that was previously selected
- a reservation for a department is not possible
- reservation of the material is not possible if there is no copy available for loan, unless the copy has value 2 – *in process* in subfield 996/997q
- in libraries with departments the reservation of the item can be recorded only in the department to which the item belongs, i.e. to which it was put on interdepartmental loan

You can enter a reservation for the material in the following two ways:

- if a physical copy is in front of you, you can enter a reservation by entering or reading identification number of the copy in the **Home library material** window and clicking the **Reserve** button
- if material is not in front of you, you must find the material in the catalogue first, select the material and then reserve it

Below is a description of the procedure of reserving material in catalogue.

Procedure

1. In the **Home library material** editor, click the **Catalogue** button for the selected member.

The **Catalogue** window will open.

2. Find the material (the procedure of finding the material is described in chapter 4.12.1).

3. Select the material for reservation.

Select the material from the list which has the most favourable status for the user (available, no restrictions for loan, etc.). If no copy of the material is available, select the bibliographic description of the material or one of unavailable copies of the material. For serials always select an individual volume of serials.

4. Click the **Reserve** button.

When selecting the volume of serials, after clicking the **Reserve** button, the **Select issues** window will open where you can select one or several issues.²

When selecting the bibliographic description for a multi-volume material a window will open where you must select which volume you wish to

² For serials the expression "issue" designates one item for loan. It can be an individual issue (if the issues are not bound) or several issues bound together.

reserve. You must select the physical form of the material you wish to reserve even for multimedia.

When selecting the unit which cannot be reserved (after clicking the **Reserve** button, i.e. the **OK** button in the **Select issues** window), the programme will display an appropriate message. Close the window by clicking the **OK** button and return to the **Catalogue** window to the list of displayed results. If the reservation is successful, the **Catalogue** window will close and you will return to the **Home library material** window again. The reserved material will be added to the end of the list of recorded material for the member. Reservation validity expiry date is automatically calculated on the basis of reservation validity, i.e. reservation validity period of the available material defined in the time parameter table for that type of material (see. chapter 2.1).

If there are restrictions for the member or the material restricting or disabling the reservation, an appropriate warning will be displayed. In the following cases you can decide if you wish to reserve the material despite the restrictions:

- the member has already reached the maximum allowed number of reservations
- availability level (996/997p) is defined for the copy restricting the loan; it usually applies to availability level 4 – restricted availability – reading room, 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 the loan; it usually applies to status 6 – damaged

The *material cannot be reserved* in the following cases:

- there is no field 996/997 with accession number for the material
- the material does not belong to the department or is not put on interdepartmental loan to the department in which you wish to put it on loan (applies to libraries in which loan is organised by departments)
- the library does not allow loan for that type of material (reservation validity period is not defined in the time parameter table)
- availability restriction is defined for the copy 0d (996/997u) restricting outside loan, reading room loan and reservation of the material
- the material is already on loan to the member
- the material is already reserved by the member
- availability level (996/997p) is defined for the copy restricting reading room loan; this usually applies to availability level 7 – completely inaccessible (archival copy)
- status (996/997q) is defined for the copy restricting reading room loan; this usually applies to status that is different from 6 – damaged

- the Reserve button is inactive as one of the restrictions which disable the reservation applies for the member (Entry denied, Internet access only, membership card retained)
- the Reserve 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 up special parameters upon the library's request)

**Tip:**

Upon the library's request, a special parameter can be set up, where in the case of unsettled debts within a specific period, a note will be automatically displayed before conditions for loan restrictions are activated.

4.13.1 Reservations of available material

Reservation of the material that is not recorded for any member or partner is called a reservation of available material. When reserving available material the selected *item for loan* is reserved. Reservation of available material is related to ID number of the copy, which is accession number for monographs; for serials in several issues, accession number is followed by the issue number, i.e. a range of issues numbers bound together.

The reserved copy is displayed at the end of the list of the material recorded for the member and has status *O*. Reservation validity expiry date is automatically calculated based on reservation validity period of the available copy which you defined for that type of material in time parameters table in the column *ord*. (see. chapter 2.1). During this period you usually do not lend this copy to other members. The period to which the reservation of available material applies is usually shorter than the period that applies to usual reservations.

The reserved material must be prepared for the member and the member who reserved it must be notified that the material can be collected. You can prepare a list of material ready to be collected by the **Process reservations** method in the **Unavailable material** class (see. chapter 4.13.3). The material from the list must be found and according to library's procedures marked as ready to be collected by the **Prepare reserved material for collection** method in the **Unavailable material** class. Then, you can notify the member who reserved the material about this. You will notify the member in a way which he/she chose from available options (e-mail, etc.) and you will place the material on the shelf for that purpose.

**Note:**

If you wish to be notified regularly about reservations of available material recorded by the members in COBISS/OPAC, you must enter e-mail address for

receiving notifications on reservations (see chapter 2.5). In libraries with departments enter e-mail address to the data on department.



Note:

If you put on loan available material which is reserved for the member despite that, the reservation will be automatically changed to the reservation of unavailable material (status O is changed to status R), and the member will be placed on the first place of the list of reservations.

4.13.1.1 Preparing reserved material for collection

If you wish to record when the reserved available material is ready for collection, use the **Prepare reserved material for collection** method in the **Unavailable material** class. By using this method you will mark that the reserved available material (material with status *O*) is prepared for loan to the member who reserved the available copy or to the partner for whom the material was reserved through interlibrary loan. Before performing the procedure, a list of reserved available material must be prepared (the **Unavailable material / Process reservations** method) based on which you can search for the material on shelves and place it on the shelf where it will wait for the member who reserved it.

Precondition

The copy of the material has status *O*.

Procedure

1. Highlight the **Unavailable material** class and select the **Class / Prepare reserved material for collection** method.

The **Preparing the reserved material for collection** window will open where you will enter ID number of the copy.

2. If necessary (depending on a reader's settings) you will confirm the entry of ID number by clicking the **OK** button.

The **Preparing reserved material for collection** window will close.

Once the procedure is performed, the status *O* is changed to *W* for the reserved available material, the date of change is recorded and expiry date of the status *W* is calculated based on the period you defined for that type of material in the time parameter table in the column *wait*. (see chapter 2.1).



Tip:

In the same way you can highlight that the available material which was reserved for interlibrary loan is ready to be lent to the customer.

The library will inform the member about the preparation of the material for collection in accordance with the method of notification. When doing this you will consider the method of notification the member chose (e-mail, SMS notification, telephone call). If the member is subscribed to notifications on available reserved material and entered his/her e-mail address or telephone number, an e-mail, i.e. SMS will be sent at that moment.

If the library does not charge the costs of notification on available reserved material (automatic calculation method of the service is defined in the price list for the item *14 – RES notif. about avail. material*) and the member is not subscribed to e-notifications, the programme will prompt you to calculate the debt for the costs of notification.

After that, place the copy of the material along with the slip containing data on reservation on the shelf for reserved material.



Note:

*If material is allocated for interlibrary loan and intended for a member, a notification on received reserved material will **not be sent** (by e-mail or SMS notification) to the member, even if the member is subscribed to e-notifications about received reserved material and has entered his/her e-mail address or a telephone number.*

4.13.1.2 Printing slip with reservation details

You can place the material on the shelf for the reserved material or material allocated for interlibrary loan with a slip which contains details on the member who reserved the material or details on interlibrary loan reservations. If the material is reserved for interlibrary loan, the customer details (partner symbol or member's name and surname) and the ILL request number will be displayed on the slip. The slip is printed on the printer that is used for printing lending forms or invoices. The slip with reservation details is printed automatically:

- when returning the reserved material to the library if you allocate the copy to the member
- when preparing the reserved available material for collection (see chapter 4.13.1.1)



Note:

At the library's request, automatic printing of the slip can be turned off with a special parameter.

Options

Slip with reservation details can be printed later, if the material, for example, has been allocated to the next member on the list of reservations due to reservation cancellation in the My library service via COBISS/OPAC. Find the reserved material by using member or partner details or data on the material and save it to the workspace. Right-click on it and select **Print** or **Send** from the menu and *Slip with reservation details* from the list of report definitions.

4.13.2 Reservations of unavailable material

Reservation of the material that is recorded for another member or partner is called reservation of unavailable material.

When reserving unavailable material *record ID number* is reserved for a monograph (i.e. COBISS.SI-ID) because you do not know which copy will be available first. If it is a multi-volume material, volume designation (996d\|x) is added to record ID number and the reservation is recorded as *COBISS.SI-ID,x*. For the material in different physical forms, physical form designation (code for physical form 996g\|o) is added and the reservation is recorded as *COBISS.SI-ID,g\|o*.

For serials, the selected *item for loan* is reserved. It can be the number of the individual issue (if the issues are not bound) or the range of numbers of issues bound together.

The reserved copy is displayed at the end of the list of the material recorded for the member and has status *R*. Reservation validity expiry date is automatically calculated based on reservation validity defined for that type of material in the time parameter table in the column *res.* (see chapter 2.1).

The member is placed on the list of reservations. You can check the position on the list of reservations by highlighting the reserved material and clicking the **View** button (see chapter 4.11). The member or partner who is on the top of the list will get the material first because he/she reserved it first or the material was reserved for the member through interlibrary loan.

The material is allocated to the member who is the first on the list of reservations if the following events are recorded for the member who has the material at that moment:

- return of the material
- deleting the reservation of available material (status *O* or *W*)
- cancellation of the reservation in the My library service

You can find a more detailed description of allocating material for interlibrary loan in the COBISS3/Interlibrary Loan software module in the COBISS3/Interlibrary Loan User Manual, see chapter 2.3.2.1.

Status of the material is changed from *R – reserved unavailable material* to *W – waiting (reserved)* in the records of the material for the member (the **Home library material** window) for whom the reservation is recorded.

The member will be informed that the material has been received in a way that is provided in the library for this purpose (e-mail, SMS notification, telephone call). If the member is subscribed to e-notifications about availability of the reserved material and if the member entered his/her e-mail, i.e. mobile phone number, e-mail, i.e. SMS notification will be sent at that moment. You can place the material on the shelf for available reserved material with the slip containing reservation details.

If the reserved material is allocated to that member due to deletion or cancellation of the reservation for other member, you must find the material and, if necessary, print the new slip with reservation details.

4.13.2.1 Editing a list of reservations

When reserving unavailable material the member is placed on the currently last place of the list of reservations. You can check the position on the list of reservations by highlighting the reserved material and clicking the **View** button (see chapter 4.11). The order of the members on the list of reservations is automatically changed in the following cases:

- when the reserved material is returned to the library and is allocated to the member or for interlibrary loan (status of the material is changed from *R – reserved unavailable materials* to *W – waiting on the shelf (reserved)*, other members on the list move up for one place
- when the material is lent to someone else and not to the member with the reservation of available material (status of the material was *W – waiting on the shelf (reserved)* or *O – reserved available material*) the member with the reservation is placed on the first place of the list of reservations
- when the reservations are deleted or cancelled, other members on the list of reservations are moved up for one place on the list of reservations

The order of members on the list of reservations can be edited *manually* by the **Change place of reservation** method. The method is available in the **Insight into library material status** window which opens when using the **View** method (see chapter 4.11).

Precondition

Conditions to change the place on the list of reservations are:

- privilege *LOAN_RES – Editing list of reservations*
- you came to the **Insight into library material status** window from the **Home library material** window for the member for whom you wish to change place of reservation

Procedure

1. In the **Insight into library material status** window click the **Change place of reservation** button.

The **Changing place of reservation** window will open where current place of the member on the list of reservations is displayed. If there is no list of reservations or there is only one member on it, a warning message will be displayed.

2. In "New place" enter the place on which you wish to place the member on the list of reservations.
3. Save the changes by clicking the **OK** button.

You will return to the **Insight into the library material status** window.

4.13.3 Processing reservations

In order to follow regularly new reservations of available material reserved by members via COBISS/OPAC or by a librarian at the member's request in the COBISS3/Loan software module, or on the basis of ILL requests, it is recommended to regularly prepare lists of new and cancelled reservations. It is useful to prepare the list at least once a day. On the basis of that list you will move the reserved material to the special place or transfer it to the interlibrary loan department, where it will wait for the member or partner who reserved or ordered the material. The material whose reservations were cancelled via COBISS/OPAC must be returned to the shelves or to closed stacks. In libraries that have loan organised by departments you must prepare the list for each department separately. In libraries that use the COBISS3/Interlibrary Loan software module, the material which was reserved for interlibrary loan will also be displayed on the list.

You can prepare:

- list of new reservations created during the period of the last creation of the list of new and cancelled reservations

The list of new reservations contains details on reserved available material (status *O*) in loan and interlibrary loan. Data on material is sorted by call numbers on the list.

- list of reservations cancelled via COBISS/OPAC

The list contains details on copies for which the reservation (material with statuses *O* and *W*) has been cancelled, details on the member who cancelled the reservation and data on the status of the copy after reservation cancellation.

- daily list of new reservations
- daily list of cancelled reservations
- lending forms for new reservations

Lending forms for the material on the list can be prepared when preparing the list. Lending forms are actually order forms sent to the closed stacks.

Procedure

1. Highlight the **Unavailable material** class and select the method **Class / Process reservations**.

The **Reservation processing** window will open displaying the date of the last creation of the list of reservations – it is the date and time when the list "new reservations and cancellations via COBISS/OPAC" was selected when processing the reservations.

2. Select the list that you wish to prepare by ticking the appropriate radio button:
 - new reservations and cancellations in COBISS/OPAC which contains all new reservations (in the COBISS3/Loan module and via COBISS/OPAC) and cancellations via COBISS/OPAC since the last

creation of the list; two lists are created

- daily list which contains all new reservations and cancellations via COBISS/OPAC on the present day; two lists are created

3. Use the check box to select if the list should include also:

- new reservations of unavailable material (material with status *R*)
- lending forms for reserved available material

The last selection in the check boxes is saved to user's settings, that's why it is not necessary to reselect the checkboxes during the next processing of reservations, unless you wish to change the settings.

4. Confirm the selection by clicking the **OK** button.

If the selected report(s) is/are successfully created, it will be sent to the printer. The created reports are automatically saved to the folder *Loan* and it is possible to print them later in the COBISS3/Reports module. In the folder *Loan* in the menu under **Creating reports** select **Browse stored reports**. The window containing the list of created reports will open. The name of the file contains date and time of report creation and in libraries with department ID in which the report was created.



Note:

If the copy has status available on the list of cancelled reservations, the text "Back to the shelf" will be displayed next to member's details. The copy should be returned on the shelf or to the closed stacks.

If the material was allocated to the next member or partner on the list of reservations after the reservation was cancelled, details of that member or partner will be displayed. In this case, the copy is not returned on the shelf or to the closed stacks. The member to whom the material was allocated must be notified that the material waits in the library. If the library enables notification about available reserved material by e-mail or SMS notification and if that service is activated for the member, the member will receive an automatic notification.



Note:

If you wish to be regularly informed about reservations of available material recorded by the members via COBISS/OPAC, you must enter e-mail address for receiving notifications about reservations (see chapter 2.5).

4.13.4 Batch deletion of reservations whose validity period expired

When recording reservations the date until which the reservation is valid is determined on the basis of the reservation validity period for individual type of

material entered to the time parameter table (see chapter 2.1). If the member does not collect the material until that date, the reservation is considered to be invalid. The reservations can be deleted several times a day. If the loan is organised separately by departments, reservations must be deleted separately in every department.

For batch deletion of reservations whose validity period expired use the method **Delete expired reservations** in the **Unavailable material** class.

Procedure

1. Highlight the **Unavailable material** class and select the **Class / Delete expired reservations** method.

The **Delete expired reservations** window will open.

2. Select the reservations that you wish to delete:

- W – waiting on the shelf (reserved)
- O – reserved available copy
- R – reserved unavailable copy

You can highlight several different reservations or all types of reservations.

3. Confirm the selection by clicking the **OK** button.

The **Overview and sending of created report** window will open where you can see or send to printer the list of deleted reservations. Since the report is automatically saved, it is possible to print it later from the COBISS3/Report module. In the folder *Loan highlight the* List of deleted reservations and in the menu **Creating reports** select the method **Browse stored reports**. The window containing the list of created reports will open. The name of the file contains date and time of report creation and in libraries with department department ID in which the report was created.

During the procedure of deletion the programme checks if the copies with deleted reservation are reserved by other members. If so, the material with status *W* or *O* is allocated to the next member on the list of reservations.



Note:

If the library notifies the members about reservations whose validity period expired, the members who selected the option for such notifications either by e-mail or by SMS notification (ticked check box "Notif. about reservation expiry") will also receive a notification about deleting the reservation of the material.



Note:

Interlibrary loan reservations will not be deleted when batch deleting reservations.



Tip:

When searching for the material on the shelf on the basis of the list of new reservations of available material, use the **Prepare reserved material for**

collection method in the **Unavailable material** class (see chapter 4.13.1.1). By doing so you change the loan status from *O* to *W*.

4.13.5 Reserving material for reading room use

Some libraries allow the material to be borrowed and used only in the reading room. A library can reserve the desired material for reading room use for a specific period of time (e.g. 5 days). This means that the material is in the reading room and will wait for the member at a special place (on the shelf, in the cupboard, etc.) and will not be available to other members. Within the specified period, a member can borrow the material to the reading room several times and then return it to the special place, where it will wait for him/her.

Precondition

General conditions for a reading room reservation are as follows:

- reservation can be recorded only for the member you previously selected
- reservation for department is not possible
- reservation of material is not possible if a copy is not accessible for loan
- reservation of material is not possible if a copy is not available for loan
- in libraries with departments, it is possible to record a reservation of a copy only in the department to which a copy belongs to or is on interdepartmental loan to that department

Procedure

1. In the **Home library material** editor, click the **Catalogue** button under the selected member.

The **Catalogue** window will open.

2. Find the material (the procedure of searching the catalogue is described in chapter 4.12.1).
3. Select the copy of the material for reading room reservation.

For serials, always select an individual volume of the serial and then select one or more issues in the **Select issues** window.

If no copy of the material is available, you can record a reservation of unavailable material.

4. Highlight the **Reading room** radio button and click the **Reserve** button.

After a successful reservation, the **Catalogue** window will close and the **Home library material** window will stay open. The reserved material will be added at the end of the list of recorded material under the member with status *U* –

reserved in reading room. The reading room reservation expiry date will be automatically calculated based on the reading room reservation validity period that is defined for this type of material in the column *read.* in the time parameters table.



Note:

If there are restrictions for the member or the material restricting or disabling the reading room reservation, appropriate message will be displayed. You can decide whether you wish to reserve the material despite the restrictions in the following cases:

- the member has already reached the maximum allowed number of reservations*
- availability level (996/997p) is defined for the copy restricting the 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 the loan; it usually applies to status 6 – damaged*



Note:

The material cannot be reserved for reading room in the following cases:

- there is no field 996/997 with accession number for the material*
- the material does not belong to the department or is not put on interdepartmental loan to the department in which you wish to put it on loan (applies to libraries in which loan is organised by departments)*
- the library does not allow loan for that type of material (reservation validity period is not defined in the time parameter table)*
- availability restriction is defined for the copy 0d (996/997u) restricting outside loan, reading room loan and reservation of the material*
- the material is already on loan to the member*
- the material is already reserved by the member*
- availability level (996/997p) is defined for the copy restricting reading room loan; this usually applies to availability level 7 – completely inaccessible (archival copy)*
- status (996/997q) is defined for the copy restricting reading room loan; this usually applies to a status that is different from 6 – damaged*
- the **Reserve** button is inactive as one of the restrictions which disable the reservation applies for the member (Entry denied, Internet access only, Membership card retained)*

7.1 MANAGING PRICE LIST

If you charge library services to library members, you will define the price list. You can enter, edit or delete the price list in the **Price list** class. Charging of services is based on currently valid price list, except for charging fines for which prices from the price lists which were valid at the time of delay are also taken into account.



Note:

To manage price lists, the privilege CRO_PL – Price list management is required.

7.1.1 Entering price list

When you create a new price list, you can copy the valid price list or an archived price list (see chapter 7.1.1.3). You can also create a new price list without transferring data.

In libraries where loan is organized by departments, the same price list can be applied to all departments or every department can have its own price list. If the price list is different only in some departments, first create a price list that is applicable to the Home library and then create separate price lists for departments where the price list will be different.



Tip:

If the same price list is applicable to all departments and the library does not charge for any services in the department, create a price list with no items for this department.

You can enter and save the price list in the **Price list** class. The price list can have the following statuses: *in preparation*, *valid* or *archived*.

Procedure

1. Highlight the **Price list** class and select the **Class / New object** method.

In libraries with departments, the **Validity** window will open. In libraries without departments, continue the procedure with step 4.

2. Define price list validity.

You can select:

- "Home library" – if a library has no departments or the same price list is applicable to all or several departments
- "Department" – select the department for which you wish to create the price list from the drop-down list

If the parameter for separate price lists by departments is set up, you can select only one of the departments.

3. Click the **OK** button. The **Price list** editor will open.

The data in "Valid from" and "Valid to" are defined by the method for defining price list validity, therefore, you cannot access them in this editor.

4. Select the desired group of services or debts on the tab (see chapter 7.1.1.1) and click the **New object** button.
5. Enter the data (see chapter 7.1.1.2).
6. Save the data.

Price list status upon creation

Price list

- *in preparation*



Tip:

If a library wishes the uniform price list to be applicable to the department with the valid price list, a request must be sent to IZUM.

7.1.1.1 Selecting group of services or debts

You can select one of the following groups of services or debt on tabs:

- Services/debts – member category (LOAN)

This group contains price classes related to member category. You will select the group if you wish to enter the price for membership fee or admission fee or the price for new membership card.

- Services/debts – type of material (LOAN)

This group contains price classes related to type of material. You will select the group if you wish to enter the price for lending fee or fee for the use of material, outside loan overdue fine or reading room overdue fine. You will enter the price for overdue notice to this group, if you charge the costs for overdue notices for every copy separately.

- Services/debts – unit (LOAN)

This group contains prices for overdue notices (if you charge the costs for each overdue notice regardless of the number of units on the overdue notice), for notifications about available reserved material and for reservations of available copies.

- Services/debts – other (LOAN)

This group contains prices for the services which are not related to price classes, e.g. price for photocopies, lost material, etc.

- Services/debts (ILL)

This group contains prices for interlibrary loan services. The procedure is described in the *COBISS3/Interlibrary Loan User Manual* (see chapter 11.3).

7.1.1.2 Entering and editing services or debts

Procedure

1. To enter new service or debt, click the **New object** button.

The **Service/debt – group** editor will open.

2. Select the service or debt from the code list.

You can select among those types of services or debts that are available according to the selected group.

3. Select the price class from the code list.

The price class depends on which group of services or debts you selected. For some types of services or debts the price classes are related to member category (e.g. membership fee) or to type of material (e.g. overdue fine). In the **Services/debts – unit (LOAN)** group you cannot select the price class. In the **Services/debts – other (LOAN)** group you can specify the price class yourself, but the price list code cannot contain more than three digits.

4. "Service/debts code" is automatically configured from the code for the type of service or debt and from the price list code.

5. "Description" is automatically configured from the value in "Type of service/debts" and from the value in "Price class".

The description is intended to facilitate identification of the code for the service or debt in the reports and can be edited or modified.

6. Enter the data for price calculation in "Unit of measure", "Price per unit", "Tax rate" and "Discount rate". If you the price per unit is not defined, you must enter it when you record the debts manually.



Note:

If you wish to enter debts automatically, you should define the price per unit.

Under "Amount", the total amount is automatically calculated according to entered data.

7. Select if the debt will be recorded automatically or manually from the drop-down list in "Calculation method".

Manual debt entry means that you will record the debt on the basis of the price from the price list and manual entry of the number of units.

Automatic debt entry means that debts can be calculated and recorded when performing the procedure. In that way it is possible to record debts for admission or membership fee when registering new members or when the member whose membership expired visits the library. Debts for an overdue fine can be automatically recorded when returning the material or renewing loan period for the material whose loan period expired. If you select

automatic calculation under the type of service or debts for which the calculation method is not available, a warning message will be displayed.

8. In "Note" enter the text of the note for internal use.
9. Click the **OK** button.
10. To enter new service or debt, repeat the procedure from step 1 to 9.
11. If you wish to *edit* the service or debt in the price list, highlight it and click the **Edit** button.
12. If you wish to *delete* the service or debt from the price list, highlight it and click the **Delete** button.

Options

Open the folder **Service/debts – group** in the list of objects related to the price list and select the service/debt you wish to edit from the list. After that select the **Object / Edit** method.



Note:

You can edit only the services and debts in the price list with status in preparation, except the group Services/debts (ILL) where you can add new suppliers to the price list with status valid.

7.1.1.3 Copying to prepared price list

You can create a new price list by finding and selecting the valid price list or an archived price list and by copying it.

Precondition

The price list has status *valid* or *archived*.

Procedure

1. In the **Price list** class find and select the price list.
2. Select the **Object / Copy to prepared price list** method.
3. In libraries with departments, the **Validity** window will open.

You can select one of the following:

- “Home library” – if the same price list is applicable to all or several departments
- “Department” – if you are creating a price list for a specific department, select it from the drop-down list

All defined groups of services and debts will be transferred from the copied price list to the new price list. The values "Valid from" and "Valid to" will not be copied.

Status of the new price list after

Price list

- *in preparation*

7.1.2 Editing price list

You can define, edit and delete groups of services and debts for the price list in preparation. The data is changed in the **Price list** editor.

Precondition

The price list has status *in preparation*.

Procedure

1. In the **Price list** class find and select the price list.
2. Select the **Object / Edit** method. The **Price list** method editor will open.
3. Edit the data (see chapter 7.1.1.1 and chapter 7.1.1.2).
4. Save the data.

Options

You can edit the pricelist by opening the folder **Service/debt – group** in the list of objects related to the price list and by selecting the service or debt you wish to edit from the list. After that select the **Object / Edit** method.

7.1.3 Defining price list validity

The price list in preparation can be defined as valid at any time.

Precondition

Status of the price list is in preparation.

Procedure

1. Find and select the price list.
2. Select the **Object / Define the price list as valid** method.

The current date is entered in "valid from" for the selected price list and its status is changed. The price list which was so far in preparation becomes valid, while previously valid price list is archived. At the same time the date that is one day earlier than the current date is entered in "Valid to" for previously valid price list. Status of previously valid price list is also changed.

Status after defining validity

Price list in preparation

- *valid*

Previously valid price list

- *archived*



Tip:

If you wish to view currently valid price list, select the **Price list** class and the **Class / Load active price list** method.



Tip:

If you wish to print the price list with all groups of services and debts on a printer, first find the price list and in the **Price list** class use the **Object / Print** method.

7.1.4 Deleting price list

You can delete any price list with status *in preparation* from the database.

Precondition

Status of the price list is *in preparation*.

Procedure

1. Find and select the price list.
2. Select the **Object / Delete** method.

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 *automatically* 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 room 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, upon the 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.

Upon the library's request, it is possible to set up a special parameter to limit the number of days for which the fine can be charged until the date of receipt of the 3rd overdue notice.

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 for which the loan period expired
- the price for the costs of overdue notices is entered to the price list, and under "Calculation method", the value *automatically* is entered

Costs of overdue notices can be specified in several 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
- so that the cost of the new overdue notice overwrites the cost of the previous overdue notice (e.g. the cost of the 3rd overdue notice overwrites the cost of the 2nd overdue notice)



Note:

Upon the library's request, calculation method for overdue notices can be set up by a special parameter.

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 *automatically* 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).

7.3 SETTLING DEBTS AND PRINTING INVOICES

Debts settlement is entered in the **Entering and settling debts** window.

Procedure



Tip:

If the object **Member** is already on the workspace, highlight it with the mouse.


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:

In the **Home library material** window, click the icon  under member's name.

3. Highlight the debt with the mouse on the list of entered debts which the member will settle.

The amount which must be paid by the member will be displayed in "Payment (total)".

4. Click the **Settle debts** button.

The **Debt settlement** window will open.

5. Enter the data related to debt settlement.

Select the method of settlement which can be cash, non-cash or non-cash payment outside the library. If you selected the non-cash method, you can select the type of non-cash method (e.g. Moneta) from the drop-down list; at the same time you can enter a note. You can enter the note to be printed on invoice or on the list of invoices as well. Enter the amount of cash you received from the member in "Cash". If you selected a non-cash method of settlement, the "Cash" field is not active.

If a member cannot settle the entire debt when he or she visits the library, you can enter a partial debts settlement, in which case you enter, under "Amount due", the amount that the member will settle on that visit. After you confirm it, debts will be reduced by the settled amount, and the number of items will change accordingly. The rest of the unsettled debts will remain entered for the member.

6. If you wish to print out the invoice on a printer, confirm the entry by clicking the **Send** button, otherwise click the **OK** button.

When selecting non-cash payment outside the library the **Send** button is not active. If the cash amount is higher than the amount to be settled, the

amount to be returned to the member will be displayed in the **Message** window.

Options

You can print the invoice on a printer:

- by clicking the **View settled debts** button in the **Entering and settling debts** window a list of invoices entered within certain period of time will be displayed
- select the invoice and click the **OK** button

The structure of invoice number is the same in all libraries:

- ddnnnnn/yyyy, in libraries with departments;
- n/yyyy, in libraries without departments

where oo = department ID (e.g. 01), nnnnn = running invoice number (e.g. 00125) and yyyy = invoice issue year (e.g. 2010).



Tip:

If the library wants some other structure of invoice number, use the method **Invoice / Set invoice No.**. Enter the number that is for one less than the number of the first issued invoice after the method is applied. It is possible to enter only numbers without characters. Keep in mind that department ID (in libraries with departments) is added automatically. It is best to set the invoice number before you start to enter debt settlements.



Note:

When entering non-cash debt settlement outside the library the invoice is not printed, therefore invoice counter will not change. As the payment is not performed in the library, the settled amount is not added to the total cash register balance.



Tip:

At library's request it is possible to set up parameters which will define what will be printed on invoice. The following data is printed on invoice by default: name and surname of the member, library's department, amount in cash and change money and the details of the person who lent the item. The following data will not be printed by default: membership expiry date, name of the faculty or university, note entered during debt settlement, list of unsettled debts and list of entered material.



Tip:

The text of the clause related to VAT exemption can be changed if necessary. For this purpose, copy the system variable *Exempt from payment* (folder Variables / System / Cash register operations) to user variables and change the text there. The default value of the variable is "Exempt from VAT according to Article 42, par. 1, item 13, of the VAT Act (ZDDV-1)."

7.3.1 Settling debts for non-members

Debts settlement can also be entered when a payable service (e.g. photocopying) was performed for a person who is not a library member.

Procedure



1. In the **Invoice** class, select the **Enter debts settlement for non-member** method.

The **Debts settlement for non-members** window will open.

2. Click the **Add item** button.

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

3. Select the type of service or debts for a non-member to settle.

Select the type of service or debts and click the **OK** button. You can select only one type of service or debts.

The **Invoice item** window will open.

4. If necessary, change the data in the **Invoice item** window (e.g. number of items).

After you click the **OK** button, the item will be added to the list of debts to be settled in the **Debts settlement for non-members** window. In the same way you can add other debts for the member to settle.



Tip:

If you wish to delete the item from the list, select it and click the **Remove** button.

5. Continue the procedure by clicking the **Settle debts** button.

The **Debts settlement** window will open, where you can enter the payment for entered debts in the same way as you settle debts for library members.

Select the payment method, which can be cash, non-cash, or non-cash outside library. If you select the non-cash method, you can select a type of non-cash payment from the drop-down list (e.g. Moneta), and you can enter a note at the same time. Also, you can enter a note to be displayed on the invoice and on the list of invoices. Under »Cash«, enter the amount in cash that you received from the member. If you select the non-cash method of payment, the »Cash« field will be inactive.



Note:

You cannot enter a partial debts settlement for a person who is not a library member.

6. By clicking the **OK** button in the **Debts settlement** window, you will be returned to the **Debts settlement for non-members** window.

7. If you wish to print an invoice, click **Send**, or confirm it by clicking the **OK** button. If you make a mistake, you can cancel the invoice by clicking the **Cancel** button.

The settled amount will be added to the cash register balance and will be displayed also on the report when closing out cash register and on the list of invoices report (LOAN-CRO-01: List of invoices and LOAN-CRO-02: List of invoices incl. VAT). If a person is not a library member, the place for the membership card number on the report will be blank.

Options

You can print the invoice again by finding it in the **Invoice** class (e.g. by the invoice date), loading it to the workspace, selecting the **Object / Send** or **Object / Print** method, and selecting *Invoice* in the list of definitions.

You can cancel debts settlement subsequently by finding the invoice in the **Invoice** class and selecting the **Object / Show** method. You can cancel the invoice by clicking the **Cancel** button. You can print the cancelled invoice by finding it in the **Invoice** search window and then selecting the **Object / Send** or **Object / Print** method. Select *Cancellation of invoice* in the list of definitions.

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.

If any debts were already partially settled, the original number of items will be displayed in the column “No. of items – initial”, and the amount settled will be displayed in the column “Paid”.

7.8 OVERVIEW OF CASH REGISTER TRANSACTIONS

Cash register transactions can be viewed in two ways:

- overview of cash register transactions for individual member
- overview of cash register transactions in the search window of the **Transaction** 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.

3. Click the **View transactions** button.

The **Parameters for checking** window will open. Use it to select the department and the period for which you wish to see transactions.



4. Confirm by clicking the **OK** button.

The **View transactions** window will open, where you can find a list of cash register transactions depending on the parameters that you defined. The list is sorted in descending order by transaction date. In the “Reason for deletion/writing off debts” column, under the transaction types *writing off debts* and *debts deletion*, a reason for deletion or writing off debts will also be displayed.

By clicking the **Send** button the list can be printed to printer.

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:

1st overdue notice = 3d means 3 days after loan period expiry

2nd overdue notice = 7d means 7 days upon reception of the 1st overdue notice

3rd overdue notice = 14d means 14 days upon reception of the 2nd overdue notice

4th 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.

A library can also define the price and the method of charging costs for overdue notices (see chapter 7.1). A special parameter can be set up to define whether costs for overdue notices will be charged according to an overdue notice or according to the number of items for which a member received an 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 send 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 to printer).

Information on whether a member received an overdue notice can be found 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 on whether a member received an overdue notice can be also found 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 found in the **Details by department** window if you select an individual department and click the **Show** button.

Data on received overdue notices can be found if you select the **Overdue notices** folder on the workspace in the member's related objects or if you select the **Overdue notices - overview** method (see chapter 8.4).

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

view 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 define the status of overdue notices. If an overdue notice was 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. If an overdue notice was already sent, it will be displayed in black. If all the material from the overdue notice was already returned, it will be displayed in green.

8.4 OVERVIEW OF OVERDUE NOTICES

You can view all overdue notices for the member:

- green overdue notices for material that was already returned
- black overdue notices for material that is still on loan
- red overdue notices which were not sent yet

Procedure

1. In the **Member** class, find and select a member.
2. Select the **Object / Overdue notices - overview** method.

The **Overdue notices - overview** window will open, including the list of overdue notices. In libraries with departments, all overdue notices will be displayed regardless of the fact in which department the member received the overdue notice.

3. Highlight one (or several) overdue notices and load it to the workspace by clicking the **Select** button.

9.3 COBISS3/REPORTS

At the moment, you can create the following reports and statistics within the COBISS3/Reports software module:

- list of members (selecting in the search window)
- active members
- list of members with notes
- deleted members
- members – changed details
- list of members with debts
- material by transactions
- list of most requested material
- material in mobile library
- unavailable material in mobile library
- members with material on loan
- material by status
- members and loan period date about to expire
- notification about a loan period expiry date (mail)
- notification about a loan period expiry date (e-mail)
- transactions for member - membership card No.
- transactions for member - ID No.
- transactions involving material
- list of cash register transactions
- list of recipients of overdue notices
- list of uncollected debts
- statistics on loan – by type of material/active months
- statistics on loan – by type of material/months
- statistics on loan – by type of material (physical form)/months
- statistics on loan – by UDC (main)/language/active months
- statistics on loan – by UDC (main)/language/months
- statistics on loan – by type of material/member category (school libraries)
- statistics on loan – by class/active months
- statistics on loan – by mobile library stops/member category
- statistics on visits – by members by member category/months
- statistics on visits – by members by member category/days
- statistics on visits – by class/months
- statistics on visits – by class/days
- statistics on visits – by municipality/member category
- statistics on visits – by mobile library stop/member category
- statistics on transactions – by member category/months
- statistics on transactions – by member category/days
- statistics on transactions – by municipality/member category
- statistics on active members – by municipality/member category
- statistics on active member – by member category

- statistics on active members – by mobile library stop/member category

When using specific methods within the COBISS3/Loan software module, you can create the following reports:

- membership card label
- lending form
- returned material
- electronic notifications
- routing lists for serials
- routing details for serials
- routing details for members
- list of members before change of class/grade
- list of members after change of class/grade
- list of inactive members who will be deleted during batch deletion
- list of inactive members with outstanding debts
- price list
- invoice
- cancellation of invoice
- list of cash register transactions for member
- list of invoices after closing cash register
- slip with reservation details
- list of new reservations and cancellations via COBISS/OPAC
- daily list of reservations and cancellations
- overdue notice
- slip with data on the material that was returned to another department
- slip with reservation details on the unavailable set

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
 - LOAN-Mb-07: Statistics of updating member details – students
 - LOAN-Mb-08: List of members with debts
- Material
 - LOAN-Mt-01: Material by transactions
 - LOAN-Mt-02: List of most requested material
 - LOAN-Mt-03: Material in mobile library
 - LOAN-Mt-04: Unavailable material in mobile library
- 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
 - LOAN-CRO-02: List of invoices incl. VAT
 - LOAN-CRO-03: Summary of list of invoices incl. VAT
- Overdue notices
 - LOAN-ON-01: Overdue notices
 - LOAN-ON-02: List of recipients of overdue notices
- Data export
 - LOAN-EXP-01: Izpis Računi glave
 - LOAN-EXP-02: Izpis Računi postavke
 - LOAN-EXP-03: List of uncollected debts

Subchapters:

- Creating and printing reports
- Groups and report description

A.2 GROUPS AND REPORTS DESCRIPTION

Reports for loan purposes are created on the basis of the data on the material (i.e. bibliographic data), which is updated by using the COBISS/Cataloguing software module, the holdings data, which is updated by using the COBISS3/Holdings software module, and the member details and the records of material transactions, which are recorded by using the COBISS3/Loan software module.

Loan reports are divided into four basic groups:

- lists of members
- lists of material
- members and material
- transactions
- cash register operations
- overdue notices
- data export

A.2.1 Members

In the **Members** group, you can create lists of members according to different criteria. You can select one of the following report types:

- **LOAN-Mb-01: Selected members** is a report containing a list of members whom you found and selected in the Search – Member search window.
- **LOAN-Mb-02: Active members** is a report containing a list of members for which the date of the last visit still falls within the period specified in the parameter “Period” when creating the report.
- **LOAN-Mb-03: List of members with notes** is a report containing a list of members whom you found and selected in the **Search – Member** search window and for whom a note was entered.
- **LOAN-Mb-04: Deleted members** is a report containing a list of members whose data was deleted within a specified period. The beginning and the end of that period is specified during report creation.
- **LOAN-Mb-05: Members - changed details** is a report containing a list of members whose data was changed within a certain period. The beginning and the end of that period of time is specified during report creation. The report is intended mostly to control the procedure of automatically changing departments or school year in school libraries, as in the “Change” column, department or school year will be displayed before or after the change. In other types of

changes (e.g. changing the member's address), the value will be displayed as the name of the attribute for the member for whom the value was changed.

- **LOAN-Mb-06: Active members - by department** is a report containing a list of members for which the date of the last visit still falls within the period specified in the parameter "Period" when creating the report. The department is specified during report creation. The report can be created only in libraries with departments.
- **LOAN-Mb-07: Statistics of updating member details – students** is a report containing data on the performed update of registered members with data from the reference students database. Entry parameters for the creation of the report are: date of update (mandatory) and type of update. Summary data on the performed updates for members are displayed on the report first, followed by lists of members for each type of update.
- **LOAN-MB-08: List of members with debts** is a report containing a list of members with unsettled debts that were entered within a specified period. The beginning and the end of the period is specified during report creation. In a library with departments you can create a list for an individual department by entering the "Library department" parameter. If the parameter is not specified, all departments will be included in the list.

A.2.2 Material

In the **Material** group, you can create various lists of material based on transactions. You can select one of the following report types:

- **LOAN-Mt-01: Material by transaction** is a report containing a list of material, for which different transactions were performed within a certain period. Before you create the report, you have to specify the type of transaction, the type of material, and the beginning and end of the period.
- **LOAN-Mt-02: List of most requested material** is a report containing the list of most requested material (by number of loans, renewal periods and reservations) within a certain period. The fifty most requested titles are included in the list. Before you create the report, you have to specify the beginning and end of the period and the type of material.
- **LOAN-Mt-03: Material in mobile library** is a report containing a list of material that was delivered to the mobile library. Before you create the report, you have to select the mobile library number (the default value is 1).
- **LOAN-Mt-04: Unavailable material in mobile library** is a report containing a list of material that was delivered to the mobile library

and is entered for members (unavailable). Before you create the report, you have to select the mobile library number (the default value is 1).

A.2.3 Members and material

In the **Members and material** group, you can create various lists of material that is recorded for the members. You can select one of the following report types:

- **LOAN-MM-01: Members with material on loan** is a report which contains a list of members who have material on loan. When you create the report, you can find and select the members in the Search – Member search window first, and then limit the material on loan by entering the parameters. 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-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. 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 to 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, notifications are created only for the department in which you are currently signed in as a user. You cannot create a report for all departments at the same time!
- **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. In libraries with departments, notifications are created only for the department in which you are currently signed in as a user. You cannot create a report for all departments at the same time!

- **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 a certain period. 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. 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 a certain period. 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. 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. 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. 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-CRO-02: List of invoices incl. VAT** is a report containing all transactions of debts settlement within a specified period including data on VAT. All types of debts settlement (cash and non-cash, in library and outside library) are included. When creating the report you can specify the beginning and the end of the period and the transactions, debts, or services that should be included in the report creation. 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. In the second part of the report, data on unsettled debts will be displayed in summary by the method of payment, type of service and the VAT rate.
- **LOAN-CRO-03: Summary of list of invoices incl. VAT** is a report containing a list of all transactions of debts settlement with data on VAT by days within a specified period. Unlike the LOAN-CRO-02 report, the data in the report are displayed in summary by individual days in the specified period. In the second part of the report, data on unsettled debts are displayed in summary by the type of service and VAT rate.

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.

A.2.7 Data export

In the **Data export** group, you can prepare data for further editing in other programmes (e.g. Excel), or for the needs of data delivery outside the library.

You can select one of the following reports:

- **LOAN-EXP-01: Izpis Računi glave.txt** is a report containing summary 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 the 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.

- **LOAN-EXP-03: List of uncollected debts** is a report containing summary data on entered material for which the last overdue notice was issued. The last overdue notice is specified by a special parameter upon the library's request. The report is located in the *Data for further processing* folder. When creating the report, you must specify the »Last overdue notice received« input parameter, where you enter the number of the last overdue notice that library members can receive (the highest number of overdue notices that can be received by members is specified by a special parameter).

If necessary, limit the report by entering the period of receiving the last overdue notice. If you wish to include all the material with the last overdue notice, do not specify the parameter. In a library with departments, you can create a report for an individual department by entering the »Transaction department« where the member received the last overdue notice. If the parameter is not specified, the report will be created for all departments. Under »Membership card number« parameter, you can specify the membership card number for the member if necessary. If the parameter is not specified, the report will be created for all members.

The report is intended to export data to Excel and to further process the data. You cannot print to printer immediately.

When the report is prepared, save it to a folder in the **Overview and sending of created report** window by clicking the **Save as** button. In Excel, open the file containing the report. When importing data, click the "Delimited" radio button, select the value *65001: Unicode (UTF-8)* from the list, and separate the data by using the "|" sign, which you enter under "Other".

Data export contains the following data:

- Membership card number
- Name
- Surname
- Guardian/guarantor
- Street/number
- Postcode and city
(Note: a member's address is the same as used for the last overdue notice)
- Telephone number
(Note: all telephone numbers of the member are taken from e-notifications and member's address details)
- Date of last overdue notice
- Cost of last overdue notice
- Current fine
(Note: data on current fine is related to the copy of the material)

- Purchase price for the item
- Department
- Accession number
- Item title
- Date of loan
- Due date

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-Mt11: Loan – by mobile library stops/member category/active months
- 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: Visits 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: Visits by members – municipality/member category
- LOAN-STA-Mb09: Active members – by mobile library stops/member category
- LOAN-STA-Mb10: Visits by members – by mobile library stops/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.2.8 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 transactions¹⁵ 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. usernames¹⁶: *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 transactions¹⁷ 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. usernames¹⁸: *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 transactions¹⁹ that are taken into account in loan, 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. usernames²⁰: *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-Mt11: Loan – by mobile library stops/member category/active months

The report contains loan statistics for the selected time period, where data on the number of items on loan is sorted by mobile library stops and by member groups: youth (pre-school children and primary school pupils) and adults (other member categories). The reports contains columns only for the months when the material was put on loan (active months). Under the input parameter »Transaction«, all transactions that are taken into account in loan are set as default²¹. If necessary, you can select a different set of transactions for which you wish to create loan statistics. The input parameter »Username«, where an empty value is set as default, is available. If necessary, you can set a username under which transactions involving loan were carried out (to access the expanded username code list see *Note* at the beginning of chapter B.2). If an input parameter is not set, all usernames will be taken into account when creating the statistics. As the statistics is intended for libraries with the Mobile library department, select the Mobile library department under the input parameter “Library department”.

¹⁹ Idem.

²⁰ Idem.

²¹ Idem.

B.2.12 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 transaction²² 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.

B.2.13 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 transaction²³ 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).

²² 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.

²³ Idem.

B.2.14 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 transactions²⁴ 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. usernames²⁵: *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.2.15 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 transaction²⁶ 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.2.16 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 transaction²⁷ that is recorded in the same department within a certain period of time is considered a visit. The default

²⁴ Idem.

²⁵ Idem.

²⁶ Idem.

²⁷ Idem.

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.2.17 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 is 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 transactions²⁸ 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. usernames²⁹: *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-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 is sorted by an individual municipality and by member category. Under the input parameter "Transaction", all transactions³⁰ 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

²⁸ Idem.

²⁹ Idem.

³⁰ Idem.

default, is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames³¹: *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.2.19 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 transaction³² 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 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.2.20 I-STA-Mb09: Active members – by mobile library stops/member category

The report contains the statistics on active members in the Mobile library department. Active members are members who visited the library at least once in the selected period. Data on the number of active members is sorted according to individual mobile library stops by individual member categories. Under input parameter »Transaction«, empty value is set as default as any activity is considered a visit for the member. If necessary, you can choose a different set of activities for which you wish to create statistics on active members (e.g. only *outside loan* transactions). The »Username« input parameter is also available, where an empty value is set as default. If necessary, you can specify a different username, under which loan transactions were created (to access the expanded username code list see Note at the beginning of chapter B.2). If the input parameter is not set, all usernames will be taken into account when creating the statistics. The statistics are intended for libraries with the Mobile library department; for this reason, select *Mobile library* department under the »Library department« input parameter.

³¹ Idem.

³² Idem.

B.2.21 LOAN-STA-Mb10: Visits by members – by mobile library stops/member category

The report contains statistics on the visits by members in the Mobile library department for the selected period. Transactions that were entered in the Mobile library department for the selected period (default value is 60 minutes) are considered as one visit by a member. In a library with departments, visits are recorded separately by departments. If a member visits two different library departments within 60 minutes, two visits will be recorded in the statistics. The statistics are intended for libraries with the Mobile library department; for this reason, select *Mobile library* department under the »Library department« input parameter. Data on the number of visits is sorted according to individual mobile library stops by member categories.

B.2.22 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. usernames³³: *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.2.23 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,

³³ Idem.

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. usernames³⁴: *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 departments by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

B.2.24 LOAN-STA-T03: 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. usernames³⁵: *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.

³⁵ Idem.