

COBISS[®]

Co-operative Online Bibliographic System & Services

COBISS3/Loan

V6.4-00

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to the V6.4-00 version of COBISS3 software, and are also valid for all future software versions until they are withdrawn or another electronic version is published.

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3.7 CHANGING CLASS OR GRADE

For members of school libraries, the details about the class or grade they are in are usually changed at the beginning of a new school year. This can be done in two ways:

- manually, by changing the attribute value "Class/grade" for each library member in the **Member** editor
- automatically by using the **Change class/grade** method in the **Member** class for several (or all) library members simultaneously



Note:

To use the **Change class/grade** method, the privilege LOAN_DELETE – Deletion of members is required.

Condition

The list of classes or grades must be entered to the local code list *Class, class teacher* (310).

To change the class or grade:

Procedure

1. Select the Member class and then the **Class / Change class/grade** method.

The **Table of classes/grades (local code list Class, class teacher)** window will open.

2. Set the rules for the changes you wish to make.

In the individual rows of the table, you will see all the classes included in the local code list *Class, class teacher* (CODE 310) displayed in two columns. In the *After change* column, select the class which you wish to be the new class of the members. If you do not change this value, the class will remain the same after the procedure. The data on the class will not be changed for those members that do not have a transfer in the table. You can also specify in the table how the class or grade changes for those library members who finished their education (e.g. *C – completed*) if you do not want to delete them.



Tip:

If you do not wish to start the procedure immediately, you can save the current content of the table for later use by clicking the **Save** button. The next time you use the **Change class/grade** method, you can decide if you wish to use the already prepared table for transfer. You can edit or update the table that was already prepared before you start the procedure. If you do not wish to use the table in preparation, answer negatively, and the table will be deleted.

If the number of codes in the local code list *Class, class teacher* (CODE

310) is changed while the table is being prepared and before it is used, you can no longer use the saved table; a new table must be created.

3. Continue the procedure by clicking the **Use** button.

The **Select list of members** window will open. Within the window, two control lists will already be selected, which should be prepared during the transfer: *List of members before change* and *List of members after change*. If you do not wish to print these lists, de-select them.

4. Continue the procedure by clicking the **OK** button.

The **Transfer to next class/year** window will open.

5. To start the transfer, click the **Start** button.

During the procedure, automatic messages will appear.

- If you selected the preparation of report *List of members before change* in the **Select list of members** window, the **Overview and sending of created report** window will open. It is recommended to save the report first (use the **Save** or the **Save as** button) and then print it out if required (use the **Send** button). The list contains details about the members and classes or grades before the change and can be used to check if the transfer was performed correctly.
- The procedure is finished when the corresponding message appears in the **Change of class/grade** window.
- If you selected the preparation of report *List of members after change* in the **Select list of members** window, the **Overview and sending of created report** window will open. It is recommended to save the report first (use the **Save** or the **Save as** button) and then print it out if required (use the **Send** button). The list contains details about the members and classes or grades after the change and can be used to check if the transfer was performed correctly.

6. To close the window after the transfer is finished, click the **Close** button.

When you change the class or grade, the transaction of a change in the member details is recorded. You can prepare a list of members, for whom the class or grade was changed by selecting the report **LOAN-Mb-05: Members – changed details** in the COBISS3/Reports software module. The list includes both the old and the new attribute values for "Class/grade" for each member.



Note:

It is recommended to perform the change of class/grade before you enter new library members starting their education in class 1 or grade 1 in order not to mix up old and new first year students. If you enter new library members first anyway, enter a special code (e.g. N1.a) in the "Class/grade" field or leave it blank. If you have already entered the new members from year 1 and did not label them especially, it is recommended to leave the transfer for these classes/grades in the table of classes/grades unchanged.

3.10 ENTERING A VISIT

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

You can enter:

- a visit by a member in the reading room
- a visit by a member for other reasons
- a visit by a member for internet access
- a visit by a person who is not a library member

Procedure

1. Highlight the **Member** class and select the **Class / Enter a visit** method.
The **Enter visit** window will open.

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

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

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

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

4. Select the member.

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

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



Note:

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

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

- for the following two loan reports in the *Member* group: LOAN-Mb-02: Active members and LOAN-Mb-06: Active members – by department

- for the following two loan reports in the *Transactions* group: LOAN-TR-01: Transactions for member – membership card No. and LOAN-TR-02: Transactions for member – ID No. (when the relevant transaction type is selected)
- for all loan statistics in the *Transactions* group
- for all loan statistics in the *Visit* group
- for all loan statistics in the *Visit by transactions* subgroup
- for all loan statistics in the *Active members* group

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. For members, whose data is not defined to be displayed in such a way, a member category will be displayed.

- total amount of outstanding debts (in libraries that use a cash register); if the amount is higher than 0, it will be displayed in red
- limitation of number of copies (items) on loan
- restriction on loan renewal
- restrictions
- privileges
- note (displayed in red)
- 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.

**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. Issues in the list are sorted from newest to oldest issue number. 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 items 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.

4.5 RETURNING MATERIAL

Returning material refers to the material which has been put on outside or reading room loan (material with status *C* or *S*), returned with restriction (material with status *B*), recorded as lost (material with status *L*) and to deleting the reservations of material (material with status *R*, *W*, *O* or *U*).



Note:

You cannot record return or delete reservation for the material that was reserved or borrowed through interlibrary loan. These procedures must be performed through interlibrary loan.

The material can be deleted from the member's list of material in several ways:

- without selecting the member, by entering the item's identification number
- in the **Home library material** window, by entering the item's identification number (accession number or loan number)
- in the **Home library material** window by selecting the item(s) from the list; only in that way you can delete the reservations of currently unavailable material (material status *R*) where reservation ID number is COBISS.SI-ID



Tip:

In libraries that allow transferring material on loan from one member to another, the return of material can be performed automatically when you put material on loan to another member. This option can be turned on by setting a special parameter upon the library's request. This is common practice in school libraries.

The procedure of returning the material that was put on interdepartmental loan from the host department to the parent department is done in the same way as returning material borrowed by the member. If the material is reserved in the parent department, a note will be displayed.

When returning the material whose loan period has expired you can record the debt for the fine (see chapter 7.2.2.2). If the member has already received the overdue notice and returns all the material for which the overdue notice has been issued, the overdue notice and note indicator *OVR* will be deleted when returning the material.

When returning the material which is reserved, the details on the reservation that is on the top of the list of reservations will be displayed. If **reservation for member** (who has reserved the material in loan) is at the top of the list, the

member's membership card number, together with his/her name and surname, will be displayed. If **reservation for interlibrary loan** is at the top of the list, the details on the new customer (partner symbol or member's name and surname), the number of their ILL request and the date until which the material will be waiting for collection will be displayed.

In case of **reservation for member**, once the material is successfully returned, the material is allocated to this member; at the same time the status of the reserved material is automatically changed from *R – reserved unavailable material* to *W – waiting (reserved)*.

The member is informed about availability of reserved material in a manner provided for this purpose in the library by taking into account method of notification designated by the member (e-mail, SMS). If the member selected e-mail as the method of notification about available reserved material and entered his/her e-mail address, he/she will receive e-mail after the reserved material is returned. If the member selected SMS as the method of notification about available reserved material and entered his/her telephone number, he/she will receive an SMS after the reserved material is returned. The library can receive a copy of the notification sent to e-mail address which was enabled upon the library's request in the configuration file.



Note:

If the material is assigned for interlibrary loan and intended for a member, a notification about availability of reserved material will **not be sent** (by e-mail or as an SMS notification) to the member, even if he/she is subscribed to e-notification about availability of reserved material and has entered his/her e-mail address and mobile phone number.

When returning the material which is reserved and available for loan with restriction, a note will be displayed. If reservation for a member is at the top of the list, you can decide if you will allocate the material to the member. If reservation for interlibrary loan is at the top of the list, the material will be automatically allocated for interlibrary loan (despite the note).

When returning the material which is reserved and not available for loan, a note will be displayed. If reservation for a member is at the top of the list, you cannot allocate the material to the member. The reservation for this material will be automatically deleted if there is no copy of the material accessible without restrictions in the library. If reservation for interlibrary loan is at the top of the list, the material will not be allocated for interlibrary loan but will remain reserved for interlibrary loan.

When returning the material on interdepartmental loan which is reserved in the host department, a note that the material belongs to another department will be displayed. You can decide if you still wish to assign the material to the member who reserved it. If the material is reserved in the parent department and the host department at the same time, you can decide, if you still wish to allocate the material to the member who reserved it in the host department. If you do not confirm the allocation, the reservation in the host department will be automatically deleted.

If in the list of reservations, a reservation for interlibrary loan is in the first place, the material will be automatically allocated for interlibrary loan (notwithstanding the note).

If the parameter for printing the slip with reservation details is set in the configuration file of the library, the slip with reservation details (e.g. member/partner's data, ILL request number in interlibrary loan reservation, data on material, method of notification for the member, etc.) will be printed on the printer used during loan procedures for printing lending forms or payment certificates. After that, the material is put on the shelf for available reserved material along with the slip which contains reservation details.

When returning the material which was on reading room loan (status *S*) and reserved for reading room use before that, a note will be displayed. If a member still wishes to use the material in reading room and the reading room reservation validity period has not expired yet, reconfirm the reading room reservation for the material (status *U*). When you do this, the date of the first reading room reservation will be displayed in the first row of the 6th column, and the date of the last reservation will be displayed in the 3rd row of the 6th column. The date of the reading room reservation validity period will remain the same (i.e. as it was when the first reading room reservation was entered).

When returning material that was entered as lost (status *L*) a note will be displayed in a new window. If you wish to mark the item as permanently lost, select it and confirm the selection. When you confirm the selection, status 8 – *lost* (subfield 996q) will be entered into the holdings data, and by entering availability restrictions *Od* into subfield 996u, loan will be disabled (see also chapter 4.15).



Tip:

If you tick the *Yes* check box in the **Unavailable material** class in the "Returned material" search field, you can search for the material the member returned at his/her last visit. The data on the returned material is stored until the member returns some other material at his/her next visit (not the same day).



Note:

As a rule, in libraries with departments, only copies that were put on loan in the department that you are currently logged in can be returned to that department. However, a library can allow its members to return the material also to another department and not only to the one that they borrowed it from. In this case, a library must make sure that the material is returned to the department where it was borrowed from.

School libraries in which a special parameter is set up upon the library's request can also allow the material that was put on loan in the textbook fund department to be returned to any other department.

An item that was borrowed through interdepartmental loan cannot be returned to the parent department until it is available in the host department.

4.5.1 Returning material without selecting the member

When you wish to return the material quickly without selecting the library member (e.g. in the case of returning a larger quantity of material that was borrowed by different library members), you can select the option of returning the material without member selection.

Precondition

Returning material without selecting a member in libraries with departments is possible only in a department where the material was put on loan, unless this is a textbook fund material (see note above).

Procedure

1. Highlight the **Unavailable material** class.
2. Select the **Class / Return, delete** method.

The **Search by key** window will open. Use it to type in the identification number (accession number or loan number) or enter it by using the reader for the item that you wish to remove from the list of material on loan for the member. It is not possible to enter *record ID* (i.e. COBISS.SI-ID) in this window; thus, it is not possible to delete the reservations of unavailable monographs.

3. If necessary (depending on how the reader is set up), confirm the entry by clicking the **OK** button.

The **Home library material** window will open for the member for whom that item is recorded. The item whose identification number you entered is already selected, the **Return** button is active, so you can confirm the return of the material by pressing the <Return> key.

After you confirm it, the **Home library material** window will close and the **Search by key window** will open again, where you can enter the identification number of the next item to be returned. Exit the window by clicking the **Cancel** button.

Options

If you wish to check or enter any other material for the member, highlight the member that was loaded to the workspace and use the **Home library material** method.

4.5.1.1 Returning serials

Serials that do not consist of separate issues (e.g. serials issued once a year that do not have numbering on the issue level) or if all the serials' issues are bound together, are returned as a monograph. When returning serials with unbound or partially bound issues you have to enter a comma (",") after every accession number, followed by the loan unit. The loan unit can be the number of the individual issue (if the issues are not bound) or the range of numbers of the issues bound together.

If you only enter the accession number, the **Select issues** window with a list of units on loan will open once you confirm your entry. After you select the desired item(s) and confirm by clicking the **OK** button, the **Home library**

material window will open for the member for whom the item (or items) was (were) recorded.



Note:

If you selected several units that are recorded for several members, you have to repeat the procedure for every member once you record the return of material for the member with the first selected unit.

4.5.2 Returning material with member selection

The return or deletion of material from the member's material records can also be entered in the **Home library material** window. The material can be returned by entering the item's identification number or by selecting it from the list.

4.5.2.1 Returning material by entering the item's ID number

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 some other type of data (see chapter 4.1).

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

3. Under "AN/LN=", type in the item's identification number or enter it by using the reader.
4. To confirm the entry, click the **Return** button.

The issue will be removed from the member's list of material.



Note:

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

4.5.2.1.1 Returning serials

To return serials with bound or partially bound issues, enter a comma (",") after every accession number, followed by the loan unit. The loan unit can be the

number of the individual issue (if the issues are not bound) or the range of numbers of the issues bound together. Serials that do not have separate issues (e.g. serials published annually that do not have numbering on the level of issues) or serials where all the issues are bound together are returned as monographs.

When you return serials in several issues and if you only enter the accession number, the **Select issues** window will open containing the items that are recorded for the selected member. Select the desired item. Once you click the **OK** button, the selected item will be removed from the list of materials on loan for that member.

4.5.2.2 Returning material by selecting it from a list

You can also remove the material from the records by selecting it from the member's list of material.

Procedure

1. Highlight the issue(s) (one, several, or all).



Tip:

You can select all the issues on the list for return by clicking the **Select all** button.

2. To return the highlighted issue(s), click the **Return** button.



Tip:

To view the material the member returned at the time of his/her last visit, select the **Returned home library material** folder for the member. The list of returned material can be printed out in the form of a lending form, if you use the **Object / Print** or **Object / Send** method for the member, and select the **Returned material** report format in the **Report definition selection** window.

4.5.2.3 Returning material with restriction

Returning material with restriction is a special method used for returning material. If you wish to examine the returned material for potential claims (the material might be either damaged or a part might be missing from the toy set, etc.), you return it with restriction. After the procedure has been performed, the material remains recorded for the member until all debts are cleared for the member after examination. Return with restriction is used also for entering the return of incomplete or damaged sets (see chapter 4.16).

Precondition

Return with restriction is possible:

- for material which is on outside loan or reading room loan (status *C* or *S*)

- in the **Home library material** window for the selected member

Procedure

1. In the **Home library material** window, highlight one item (or more items or all items) for the selected member, or enter or read the item identification number (accession number or loan number).



Note:

If your reader is set in a way that entry confirmation is automatically added, activate the **Retain** button before entering the accession number.

2. Click the **Retain** button.



Tip:

If you return the material with restriction in the **Home library material** window, you can perform the return by pressing <Alt> + <A>.

The status of the entered material is changed from *C* or *S* to *B – retained*. When calculating the due date, the time parameter *res.* (status *R*) will be taken into account. The date of entering the return with restriction is entered under “Date of return”, which will be displayed in the 1st row of the 6th column. The number of items on loan will be reduced accordingly for the member.

If the loan period has already expired and a library charges a fine for this type of material, you can enter debts for the fine.



Note:

*If the material is reserved for another member, it is not allocated to the member when the material is returned with restriction. Only after the procedure is completed and the material is deleted from the records, the reserved material can be allocated to the next member on the list of reservations (status *W*), and all standard procedures are performed at the same time (printing a slip with data on the reservation, sending e-notifications, etc.).*

Material that was returned with restriction will appear in a special table on the lending form.

When the procedure of examining material is completed, delete the material from the member’s records (the **Return** method).



Note :

*The material returned with restriction is saved to the **Returned home library material** folder only after you delete it from the member’s records.*



Notes:

Material returned with restriction can be reserved but it is not available for loan until it is deleted from the member's records.

Status B validity expiry date can only be changed manually.

Overdue notices are not created for material returned with restriction. Also, e-notifications about a forthcoming loan period expiry date and about a forthcoming overdue notice are *not* sent for material with status *B*.

4.5.2.4 Returning material in any department

Libraries with departments can allow its members to return the borrowed material to another library department.

Precondition

Returning material to a department where the material was not borrowed from is possible only in the **Home library material** window for the selected member by entering the item's identification number.

Procedure

1. In the **Home library material** window under "AN/LN=", enter or use a reader to enter the item's identification number (accession number or loan number).

A window will open explaining that material is on loan to another department.

2. Select the item that you wish to return and confirm the selection by clicking the **OK** button.

The item will be deleted from the list of entered material for the member in the department where the item was borrowed from.

A window will open informing you that material has to be returned to the department where it was borrowed from as soon as possible. A slip with data on the material is printed, which you attach to the material. Place the material to the spot where you keep materials from other departments.

Material that was returned to a different department than where it was borrowed from will get status *B – retained* in the department material records.

If the loan period for the material has expired and a library charges a fine for this type of material, debts for this fine can be entered when the material is returned to another department. Debts for the fine will be entered in the department where the material was borrowed from. If a member wishes to settle the debts immediately, first select the department where the material was borrowed from or the value *all departments* and then the appropriate debts settlement in the **Debts settlement and entry** window.

If a library charges the costs of returning the material to another department, you can enter the debt for the return to another department. The debt will be entered in a department where the material was returned.

If there is a reservation for this material in the department where the material was borrowed from, a note about the reservation will be displayed. The material is *not* allocated to the member with reservation, the slip with reservation details is *not* displayed, and e-notification about availability of reserved material will *not* be sent.

After material is delivered to the department where it was borrowed from, the material must be deleted from the material records for the department to which the material was returned.



Note:

The material that was returned to another department and has status B – retained is not available for loan until it is returned to the department where it was borrowed from. You can, however, reserve the material at your parent department.

Procedure

Log in to the department to which the material was delivered.

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

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

2. Enter two-digit department ID.

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

3. Select the material from the list or enter or use the reader to enter the item identification number (accession number or loan number) under "AN/LN=".

4. Click the **Return** button.

The material with status *B – retained* will be deleted from the list of retained material in the department.

After entering the return of material to the department where the material was borrowed from, the reserved material will be allocated to the next member from the list of reservations (status *W*), and all standard procedures will be performed (printing a slip with reservation details, sending e-notifications, etc.).

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.



Tip:

Upon the library's request, a special parameter can be set so that when you select all the material by using the **Select all** button for renewal, the material that is entered for the member in other library departments will also be renewed.

When a library sets up this parameter, you can renew the due date or reservation validity in other departments by clicking the **Renew** button even if no item is entered in the current department.

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.

4.7 CHANGING THE DUE DATE

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

Procedure

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

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

2. Select the member.

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

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

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

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



Tip:

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



Tip:

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

If you can renew loan period in all departments at the same time (see chapter 4.6) in a library, after you click the **Select all** button, an option to define the changed date also for the material that is entered in other departments for the member will be offered.



Note:

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

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

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

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

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



Note:

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



Note:

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

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.

In libraries with departments, you can reserve available or unavailable material (status *O* or *R*) also for an individual department. The procedure is the same as for reserving material for a member. In case of a reservation, the department will be added to the queue in the same way as for members. Once the material is assigned to a department, the material will have the status *W* – *waiting on the shelf (reservation)*. The material with the status *O* or *W* will receive the status *D* only when it is put on interdepartmental loan.

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.

E-notification about the received reservation for a department will be sent to the e-mail address that is entered under the data on the department.

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).

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 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 or a library department that was previously selected
- 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 a reservation of the item can be entered only in a department to which the item belongs, i.e. to which it was put on interdepartmental loan; for a department you can reserve material **only** in the item's parent department

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 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 a member or department
- the material is already reserved for a member or department

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.

- 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 the 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.

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.



Tip:

You can create a list of reservations also by sublocations of the material. This is appropriate especially for libraries where loan is not organized by departments and material is in different locations. If a library decides to process reservations by sublocations of the material (i.e. element d/l in the call number), a code list for processing reservations (CODE 322) must be prepared. As a code symbol, enter the location symbol where the reservation will be processed. Under »Value«, enter the following values:

- in libraries with no departments

sublocation 1, sublocation 2, ..., sublocation n

Example: Under "Code" enter: *Sk11*, under "Value" enter: *K,La,Mi*

- in libraries with departments

department number: sublocation 1, sublocation 2, ..., sublocation n

Example: Under "Code" enter *Sk11*, under "Value" enter: *01:K,La,Mi*

- in libraries where sublocation symbol is not entered everywhere

Define any code symbol, enter **blank** in Value

Example 1: Under "Code" enter *Centrala*, under "Value" enter *blank*

Example 2: Under "Code" enter *Sk11*, under "Vrednost" enter *K,blank*

If a code list of locations for processing reservations exists, when the method for processing reservations is activated, the drop-down list of reservations, as defined in this code list, will be displayed.

NOTE: If a library decides to process reservations by a code list of locations for processing reservations, it is important to include all sublocations to the code list. An option will be offered only for the sublocations entered in the code list.

In a library where loan is organized by departments, only reservations of the sublocations that belong to the same department can be included to the same location for processing reservations.

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.



Note:

If in a library with departments you change the price list validity so that in an individual department, instead of a uniform price list, a price list for this department will be valid, starting from a specified date, it will not be taken into account when calculating the fine for the period in which no archived price list for this department exists.

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 notification about available reserved material and for reservation 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.

7.2 ENTERING DEBTS

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

7.2.1 Entering debts manually

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

Procedure

1. In the **Member** class, find and select the member.
2. Select the **Object / Entering and settling debts** method.
3. The **Entering and settling debts** window will open.
4. Click the **Enter debts** button.
5. The **Debts entry – select service/debts** window will open.

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

6. Select the service/debt from the list and click the **OK** button.
7. The **Entered debts** window will open.

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

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

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




Note:

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

What to do next

Enter debt settlement (see chapter 7.3).

**Tip:**

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

7.2.2 Entering debts automatically

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

Currently it is possible to enter automatically:

- membership fee or admission fee when entering a new member (Member / New object), when editing member's details (Member / Edit) and when accessing the window with records on material (Member / Home library material) of the member whose membership has expired
- fine when returning, renewing loan period or changing loan period expiry date for the material whose loan period has expired
- cost of notification when allocating reserved material to the member
- cost of overdue notices when creating overdue notices
- loan fee or tear and wear fee when material is put on loan or when renewing loan period
- cost of reservation of available material for the loan of reserved material for a member, if material has status *O – reserved available copy*
- cost of uncollected material when deleting an expired reservation, if material has status *W – waiting on the shelf (reservation)*
- cost of issuing a new membership card when registering a new member
- cost of returning the material to a department different from the one in which the material was borrowed

7.2.2.1 Membership or admission fee

Precondition

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

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

under "Calculation method"

- member is not exempt from membership fee (check box under *Exempt from membership fee* is not ticked)
- new member (membership expiry date has not been entered yet) or the membership expired (membership expiry date is older than the current date)
- parameter for exemption from membership fee for members younger than 18 is set (the member, however, is older than 18)

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

- debt for the member
- current date in "Date of entry/membership renewal" (tab Membership in the Member editor)
- new membership expiry date in "Membership expiry date" (tab Membership in the Member editor) which is calculated depending on the settings related to membership validity period

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

Membership validity is defined in one of the following ways:

- as membership period set in restrictions on operations for a specific or all membership categories (see chapter 2.6)
- as a date set in restrictions on operations which applies to all members of those categories for which membership validity period is not specified in restrictions on operations



Note:

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



Tip:

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

What to do next

Enter debts settlement (see chapter 7.3).

7.2.2.1.1 Individual membership fee

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

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

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



Example:

The local code list *Type of membership fee – individual (CODE 318)* can be defined according to the library's requirements, the codes, however, should not contain more than three-digits, and the value after # must contain the time period in the prescribed structure (e.g. 7d, 100d, 6m, 5y); for example:

7d – weekly membership fee#7d
 14d – two-week membership fee#14d
 1m – monthly membership fee #1m
 6m – half-yearly membership fee#6m
 21 – two-year membership fee#2y
 251 – permanent membership#25y

etc.

or:

01 – weekly membership fee#7d
 02 – two-week membership fee #14d
 03 – monthly membership fee#1m
 04 – half-yearly membership fee #6m
 05 – two-year membership fee #2y
 06 – permanent membership#25y

etc.

- in the price list, enter the price of the membership fee or admission fee (Type of service/debts 24 – *CLS membership fee – individual*) for a specific time period and select the value *automatically* under “Calculation method”
- under member details in the **Membership** tab under the “Membership validity” attribute, select the relevant value of the time period for the

individual membership fee on the basis of the local code list *Type of membership fee – individual (CODE 318)*. The “Membership expiry date” attribute will be calculated automatically when you register a new member or renew membership on the basis of the entered time period under the “Membership validity” attribute (see chapter 3.1.2.3 *Entering membership data*).

7.2.2.2 Fine

Precondition

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

- price for the fine for which the value in "Calculation method" is set to *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).



Note:

When calculating the daily fine, if the price list changed within the delay period, the price from the archived price list will be taken into account; and, from the date when the price list was changed, the price from the current price list will be taken into account.

If in a library with departments the price list validity changed so that a price list with a defined date applies only for an individual department, and which applied for the entire library before that, the fine will not be calculated for the period for which the archived price list does not exist for this department.

**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).

7.2.2.9 Cost of returning material to another department

A library can charge the cost of returning material to another library department.

Precondition

The following conditions must be fulfilled:

- the cost of returning the material to another department is entered in the price list (item *VRA*) and the value *automatically* is selected under “Calculation method”

A debt can be entered automatically when returning material to another library department. In this case, a question will appear in a new window, whether you wish to enter a debt, data on the selected material and a price for the cost of returning material to another department. If you answer positively the amount will be added to the amount of entered debts for the member. If you answer negatively, the debt will not be entered. If a library has the local code list *Reasons for deletion/writing off debts (CODE 317)*, select a 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. By clicking **OK**, the invoice will be printed to printer.

If you select non-cash payment outside the library, the invoice will not be printed. 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.

In the transaction file, data on the transaction of the payment, based on which the visit by member was recorded, will be entered. The visit will be entered also when there is no transaction of the material.

Options

You can print the invoice to printer:

- by clicking the **View settled debts** button in the **Entering and settling debts** window a list of invoices entered within the selected period will be displayed
- by selecting the invoice and clicking the **Load invoice** button
- on the workspace, highlight the invoice and use the **Send** or **Print** method; select *Invoice* in the list of definitions

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

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

where dd = 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:

A library can define what will be printed on the invoice by changing default settings by using the **Home library/Create lending forms and invoices** method. The following data is printed on invoice by default: member's name and surname, library's department, amount in cash and change, and the details of the person who lent the item. The following data will not be printed by default: membership expiry date, name of 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. By clicking the **OK** button, confirm and print the invoice. 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.

8 OVERDUE NOTICES

Library can send overdue notices and charge the costs of overdue notices to members who do not return the material on time. The frequency of creating overdue notices depends on the library's operating activities.

Subchapters:

- Creating overdue notices
- Printing overdue notices
- Cancelling creation of overdue notices
- Overview of overdue notices
- Creating overdue notice forms

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 members with highest number of loans
- list of recipients of overdue notices
- statistics 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 loan – by financier/material/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 visits – by hours/days
- statistics on visits for transactions – by member category/months

- statistics on visits for transactions – by member category/days
- statistics on visits for transactions – by class/months
- statistics on visits for transactions – by class/days
- statistics on visits for transactions – by municipality/member category
- statistics on visits for transactions – by mobile library stops/member category
- statistics on visits for transactions – by hours/days
- 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
- statistics on active members – by member category (after the year of transition to COBISS3/Loan)
- statistics on active members – by member category (for the year of transition to COBISS3/Loan)

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
- LOAN-TR-05: Members with highest number of loans
- 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
 - LOAN-ON-03: Statistics 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, the list will be created for all departments.
- **LOAN-TR-05: Members with highest number of loans** is a report which contains a list of members with the highest number of outside loans in a specific period (number of loan renewals is not taken into account!). The list contains fifty members with the highest number of loans. When creating the report, specify the start and end of the period. If necessary, you can, by entering the input parameters »Member category« and »Type of material«, specify whether the report will be created for all members and for all material or only for the selected members and the selected material.

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 defined, the 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.

- **LOAN-ON-03: Statistics of overdue notices** contains statistics of created overdue notices for the period specified with start and end date. For each day when the overdue notices were created, the following data will be displayed for an individual overdue notice (1st, 2nd, 3rd, and 4th overdue notice): number of members who received an overdue notice, and a number of items for which they received an overdue notice. If you enter two different dates under

the »Overdue notices created on« parameter, all overdue notices, created for the selected period, will be taken into account. 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, the list will be created for all departments.

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: Izipis 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: Izipis 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 of material
 - 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-Mt12: Loan – by financier/material/member category
- Transactions
 - LOAN-STA-T01: Transactions – by member category/months
 - LOAN-STA-T02: Transactions – by member category/days
 - LOAN-STA-T03: Transactions – by municipality/member category
- Visits
 - LOAN-STA-Mb01: Visits by members – by member category/months
 - LOAN-STA-Mb02: Visits by members – by member category/days
 - LOAN-STA-Mb03: Visits by members – by class/months
 - LOAN-STA-Mb04: Visits by members – by class/day

- LOAN-STA-Mb05: Visits by members – municipality/member category
- LOAN-STA-Mb06: Visits by members – by mobile library stops/member category
- LOAN-STA-Mb07: Visits by members – by hours/days

- Visits by transactions
 - LOAN-STA-VT01: Visits by members – by member category/months (transactions)
 - LOAN-STA-VT02: Visits by members – by member category/days (transactions)
 - LOAN-STA-VT03: Visits by members – by class/months (transactions)
 - LOAN-STA-VT04: Visits by members – by class/days (transactions)
 - LOAN-STA-VT05: Visits by members – by municipality/member category (transactions)
 - LOAN-STA-VT06: Visits by members – by mobile library stops/member category (transactions)
 - LOAN-STA-VT07: Visits by members – by hours/days (transactions)

- Active members
 - LOAN-STA-A01: Active members – by member category (school libraries)
 - LOAN-STA-A02: Active members – by member category
 - LOAN-STA-A03: Active members – by municipality/member category
 - LOAN-STA-A04: Active members – by mobile library stops/member category
 - LOAN-STA-A05: Active members – by member category (after the year of transition to COBISS3/Loan)
 - LOAN-STA-A06: Active members – by member category (for the year of transition to COBISS3/Loan)

Subchapters:

- Creating and printing statistical reports
- Description of statistical reports

B.2 DESCRIPTION OF STATISTICAL REPORTS

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

- Loan of material
- Transactions
- Visit
 - Visit by transactions
- Active members



Note:

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

B.2.1 Loan of material

- **LOAN-STA-Mt01: Loan – by type of material/active months**

The report contains the statistics on the loan for selected period of time, where the number of copies on loan is arranged according to the type of material. The report only contains columns for those months when the material was put on loan (i.e. active months). Under the input parameter “Transaction”, all transactions¹ 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

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

loan were carried out (e.g. usernames²: *EBookService*, *OPAC*, *self-checkout1*, etc.). If you leave the input parameter blank, all usernames will be taken into account when creating the statistics.

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

- **LOAN-STA-Mt02: Loan - by type of material/months**

The report contains loan statistics for the selected period of time, where the number of copies on loan is arranged according to the type of material. The report contains columns for all months, regardless of whether the material was put on loan or not. Under the input parameter "Transaction", all transactions³ 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. usernames⁴: *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 the parameter is not specified, the report will be created for all departments.

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

The report contains loan statistics by the type of material. The data on the number of copies of material on loan is sorted according to the NBM_1 table (see *COBISS2/Reports* User Manual, chapter 11.3.1). Under the input parameter "Transaction", all transactions⁵ 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. usernames⁶: *EBookService*, *OPAC*, *self-checkout1*, etc.). If you leave the input parameter blank, all usernames will be taken into account when creating statistics. The data on the selected time period is organised by individual months. In libraries with departments you can create a report for individual departments by entering the

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

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

³ Idem.

⁴ Idem.

⁵ Idem.

⁶ Idem.

parameter "Library department". If the parameter is not specified, the report will be created for all departments.

- **LOAN-STA-Mt04: Loan - by UDC (main)/ language/active months**

The report contains loan statistics for the selected time period. The data on the number of copies of material on loan is sorted by the language of the material (domestic and others) for the defined main UDC codes (the local code list *UDC for statistics (CODE 85)* is taken into account). The report only contains columns for those months when the material was put on loan (i.e. active months). Under the input parameter "Transaction", all transactions⁷ 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. usernames⁸: *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 the parameter is not specified, the report will be created for all departments.

- **LOAN-STA-Mt05: Loan - by UDC (main)/language/months**

The report contains loan statistics for the selected time period. The data on the number of copies of material on loan is sorted by the language (domestic or others) of the material for the defined main UDC codes (the local code list *UDC for statistics (CODE 85)* is taken into account). The report contains columns for all months, regardless of whether the material was put on loan or not. Under the input parameter "Transaction", all transactions⁹ 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. usernames¹⁰: *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 the parameter is not specified, the report will be created for all departments.

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

⁷ Idem.

⁸ Idem.

⁹ Idem.

¹⁰ Idem.

The report contains loan statistics for the selected time period. The data on the number of copies of material on loan are sorted by groups depending on type of material: *Books –total*, *Books –fiction*, *Serials* and *Non-book material*. The data in columns is sorted depending on groups of members in school libraries: *Pupils*, *Students* and *Others*. Under the input parameter “Transaction”, all transactions¹¹ 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. usernames¹²: *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 the parameter is not specified, the report will be created for all departments.

- **LOAN-STA-Mt07: Loan –by class/active months**

The report contains the statistics on loan for the selected time period. The data on the number of copies of material borrowed by the members is sorted by classes. The report only contains columns for those months when the material was put on loan (i.e. active months). Under the input parameter “Transaction”, all transactions¹³ 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. usernames¹⁴: *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 the parameter is not specified, the report will be created for all departments.

- **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

¹¹ Idem.

¹² Idem.

¹³ Idem.

¹⁴ Idem.

¹⁵ Idem.

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 the parameter is not specified, the report will be created for all departments.

- **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 the parameter is not specified, the report will be created for all departments.

- **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), adults (other member categories), and others (institution's organizational units, legal entities – external institutions, and units for interdepartmental loan). 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

¹⁶ Idem.

¹⁷ Idem.

¹⁸ Idem.

¹⁹ Idem.

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 the parameter is not specified, the report will be created for all departments.

- **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".

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

The report contains loan statistics for the selected period, where data on the number of items on loan is sorted for an individual financier by 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), adults (other member categories), and others (institution's organizational units, legal entities – external institutions and units for interlibrary loan). Under the input parameter "Transaction" all transactions²² are included as default and will be taken into account when material is put on loan. If necessary, you can select a different set of loan transactions for which you wish to create loan statistics. The input parameter "Username" is also available, where the default value is empty. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames²³: *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 the parameter is not specified, the report will be created for all departments.

²⁰ Idem.

²¹ Idem.

²² Idem.

²³ Idem.

B.2.2 Transactions

- **LOAN-STA-T01: Transactions – by member category/months**

The report contains statistics of transactions recorded when updating member details or during the procedures related to the 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. usernames²⁴: *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 the parameter is not specified, the report will be created for all departments.

- **LOAN-STA-T02: Transactions – by member category/days**

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

- **LOAN-STA-T03: Transactions – by municipality/member category**

²⁴ Idem.

²⁵ Idem.

The report contains statistics of transactions recorded when updating member details or during the procedures related to the 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. usernames²⁶: *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 the parameter is not specified, the report will be created for all departments.

B.2.3 Visit

- **LOAN-STA-V01: Visits by members – by member category/months**

The report contains statistics on the number of visits by members for the selected time period. A visit is every transaction 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.

- **LOAN-STA-V02: Visits by members – by member category/days**

The report contains statistics on the number of visits by members for the selected time period. Every transaction²⁷ 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

²⁶ Idem.

²⁷ Idem.

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).

- **LOAN-STA-V03: Visits by members – by class/months**

The report contains statistics on the number of visits by members for the selected time period. Every transaction²⁸ 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.

- **LOAN-STA-V04: Visits by members –by class/day**

The report contains statistics on the number of visits by members for the selected time period. Every transaction²⁹ that is recorded in the same department within a certain period of time is considered a visit. The default value is 60 minutes. In library with departments the visits are counted separately by departments. If a member visited two library departments within 60 minutes, it will be considered as two visits when preparing the statistics on visits. You can create a list for individual department by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments. The data on the number of visit by members is sorted depending on their class by individual days.

- **LOAN-STA-V05: Visits by members –by municipality/member category**

The report contains statistics on the number of visits by members for the selected time period. Every transaction³⁰ 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

²⁸ Idem.

²⁹ Idem.

³⁰ Idem.

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.

- **LOAN-STA-V06: Visits by members –by mobile library stops /member category**

The report contains statistics on the number of 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 visited 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.

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

The report contains statistics on the number of visits by members for the selected period. Transactions that were entered in the library in the same department for the selected period are considered as one visit by a member. The default value is 60 minutes. 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. You can create the statistics for an individual department by entering the "Library department" parameter. Data on the number of visits is sorted according to a specific hour and days within the selected period.

B.2.3.1 Visits by transactions

Loan statistics that show data on visits by members according to specific transactions are prepared on the basis of data on transactions, which are entered by using the COBISS3/Loan software module. In terms of form, the statistics in this group are the same as the statistics (see chapter B.2.3). The difference is, however, that you can obtain the data on the visits by members for one or more individual loan transaction. When calculating visits by members, only those loan transactions that you selected under the report parameter will be taken into account. In this group of statistics, you must define an individual loan transaction (or more loan transactions) on the additional *Parameters* tab, which is a mandatory data. When you click the **Transaction** button, a code list of all transactions that can be taken into account when preparing statistics of visits by members by transactions, will be offered. You must select one or more transactions, for which you wish to be taken into account when preparing the statistics of visits by members by transactions.

For example, if you wish to create statistics of visits by members based on outside loan transactions and reading room loan transactions, you can select one of the following two transactions in the transactions code list:

- 11 – outside loan
- 12 – reading room loan

Confirm the selected transactions by clicking the **OK** button or cancel the selected transactions by clicking the **Cancel** button.

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

The report contains statistics on the visits by members in a library based on an individual transaction or a group of transactions within the selected period. The selected transactions by a member within the same department within a specified period are considered as one visit. The default value for a visit is 60 minutes. In a library with departments, visits are recorded separately by individual departments. If a member visited two different library departments within 60 minutes, two visits will be recorded in the statistics. 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. 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 the statistical report on transactions for individual department by entering the "Library department" parameter. If the parameter is not specified, the report will be created for all departments. Data on the number of visits is sorted according to member category by individual months.

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

The report contains statistics on the number of visits by members in a library according to individual or group transactions for the selected period. Transactions that are recorded in the same department within a certain time period are considered as one visit. The default value for a visit is 60 minutes. In a library with departments, visits are recorded separately by individual departments. If a member visited two different library departments within 60 minutes, two visits will be recorded in the statistics. 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. usernames³²: *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

³¹ Idem.

³² Idem.

entering the "Library department" parameter. If the parameter is not specified, the report will be created for all departments. Data on the number of visits is sorted according to member category by individual days.

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

The report contains statistics on the number of visits by members in a library according to individual or group transactions for the selected period. Transactions that are recorded in the same department within a certain time period are considered as one visit. The default value for a visit is 60 minutes. In a library with departments, visits are recorded separately by individual departments. If a member visited two different library departments within 60 minutes, two visits will be recorded in the statistics. 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 the parameter is not specified, the report will be created for all departments. Data on the number of visits is sorted according to class by individual months.

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

The report contains statistics on the number of visits by member in a library according to individual or group transactions for the selected period. Transactions that are recorded in the same department within a certain time period are considered as one visit. The default value for a visit is 60 minutes. In a library with departments, visits are recorded separately by individual departments. If a member visited two different library departments within 60 minutes, two visits will be recorded in the statistics. The input parameter "Username", where an empty value is set as default, is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames : *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 the parameter is not specified, the report will be created for all departments. Data on the number of visits is sorted according to class by individual days.

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

³³ Idem.

The report contains statistics on the number of visits by member in a library according to individual or group transactions for the selected period. Transactions that are recorded in the same department within a certain time period are considered as one visit. The default value for a visit is 60 minutes. In a library with departments, visits are recorded separately by individual departments. If a member visited two different library departments within 60 minutes, two visits will be recorded in the statistics. The input parameter "Username", where an empty value is set as default, is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames : 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 the parameter is not specified, the report will be created for all departments. Data on the number of visits is sorted according to municipality by member category.

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

The report contains statistics on the number of visits by member in a library according to individual or group transactions for the selected period. Transactions that are recorded in the same department within a certain time period are considered as one visit. The default value for a visit is 60 minutes. In a library with departments, visits are recorded separately by individual departments. If a member visited two different library departments within 60 minutes, two visits will be recorded in the statistics. The input parameter "Username", where an empty value is set as default, is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames : 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 the parameter is not specified, the report will be created for all departments. Data on the number of visits is sorted according to mobile library stops by member category.

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

The report contains statistics on the number of visits by member in a library according to individual or group transactions for the selected period. Transactions that are recorded in the same department within a certain time period are considered as one visit. The default value for a visit is 60 minutes. In a library with departments, visits are recorded separately by individual departments. If a member visited two different library departments within 60 minutes, two visits will be recorded in the statistics. The input parameter "Username", where an empty value

is set as default, is also available. If necessary, you can define a username, under which transactions involving loan were carried out (e.g. usernames : 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 the parameter is not specified, the report will be created for all departments. Data on the number of visits is sorted according to hours and days within the selected period.

B.2.4 Active members

- **LOAN-STA-A01: 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 transactions³⁴ 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. 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 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.

- **LOAN-STA-A02: 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 transactions³⁶ that are taken into account as the loan of material, are set as

³⁴ Idem.

³⁵ Idem.

³⁶ Idem.

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. usernames³⁷: *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.

- **LOAN-STA-A03: Active members – by municipality/member category**

The report contains the statistics on the number of visits by members for the selected time period. Every transaction³⁸ 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.

- **LOAN-STA-A04: 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.

³⁷ Idem.

³⁸ Idem.

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

The report is intended only for libraries that transitioned from COBISS2/Loan to COBISS3/Loan. It contains data on active members for a year in which the library transitioned to COBISS3/Loan. The statistics can be prepared only for the next year, after the year of transition (if a library, for example, transitioned in 2015, the statistics can be prepared only from 1 January 2016 onward). Active members are members who visited the library at least once in the transition year. Data on the number of active members is sorted according to member category. No input parameters are available for the creation of the report. Statistical data is prepared on the basis of previously defined criteria, which is the same in all libraries for the year of transition to the COBISS3/Loan software.

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

The report is intended only for libraries that transitioned from COBISS2/Loan to COBISS3/Loan. It is intended to prepare data on active members for the year of transition to COBISS3/Loan. In the input parameter »Date of last visit«, enter the start and end of the period for which the visits will be taken into account: from 01.01 <current year> until the date of creating the report (**mandatory**). Statistical data will be correct only if you prepare the report for the entire period from the start of the transition year to the day of creating the report.



Example:

If a library wishes to check member activity every month also in the current year of transition and would like to know the number of active members from the beginning of the year until the end of September 2015, the library has to prepare the statistics of active members until the end of September. The library has to prepare the statistics in the morning of the first working day of the following month, i.e. October. In the input parameter »Date of last visit«, the period from 01.01.2015 until 30.09.2015 must be entered.

Data on the number of active members for the selected period in the year of transition is sorted according to member category.

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