

COBISS[®]

Co-operative Online Bibliographic System & Services

COBISS3/Loan

V6.8-00

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to the V6.8-00 version of COBISS3 software, and are also valid for all future software versions until they are withdrawn or another electronic version is published.

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



Note:

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

2.4.2 Creating and sending general notifications

General notifications can be created and sent as follows:

Procedure

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

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

- contents of notification

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



Tip:

In the general notification for sending by e-mail you can specify the title and greeting arbitrarily. In the **COBISS3/Reports** software module in the **Report variables / Standard / Loan / E-notifications** the variables **General notification title** in **General notification – greeting** are included for this purpose. If you wish to change the default value, copy the variable to the **User definitions** folder and change the content accordingly. If you do not wish to include a greeting in the e-notification, delete the variable content so that the variable will be blank.

- type of notification

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

2. To confirm your entry in the window, click the **OK** button.
3. In the **General notification** window, click the **OK** button again.

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

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

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



Note:

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

2.5 CONTACT DETAILS AND INFORMATION FOR COBISS/OPAC

It is recommended for the library to publish its contact details related to the My library service in COBISS/OPAC on its web page (e.g. telephone number and e-mail address for information, special notifications etc.). The web page address where the data is published can be defined by the method **Home library / Contact details and information for COBISS/OPAC**. The members can access the page through the link in the My Library service in COBISS/OPAC. In libraries with departments it is recommended to publish contact details for each library department.

After you select the method **Home library / Contact details and information for COBISS/OPAC**, a window will open where you can enter:

- under "Contact details and info (COBISS/OPAC)" enter the URL address where your contact details and notifications related to the service My library are published
- under "E-mail address for reservations" enter the e-mail address for receiving notification about reservations of available copies carried out via COBISS/OPAC; in libraries with departments, enter e-mail address for each department under data on department
- under "E-mail for copies of e-notifi." enter the e-mail address for receiving copies of e-notifications.



Tip:

If the library has departments and wishes that copies of e-notifications for separate departments are sent to a separate e-mail address, that address is entered in the **Department** editor under "E-mail for copies of e-notifi."

- messages which are displayed during reservation of material via COBISS/OPAC:
 - message about unsuccessful reservation because the member is not subscribed to e-notifications about received reserved material; the message is displayed only if the appropriate settings were set up upon the library's request
 - message about successful reservation of available material; it consists of a record about successful reservation, reservation expiry date and note related to the collection of material
 - message about successful reservation of unavailable material; it consists of a record on successful reservation and reservation expiry date

Default values, which can be changed if needed, are in the fields for messages:

- Under "Res. not possible" the default text of the message which is displayed in case of unsuccessful reservation: *Material is not reserved. Your library does not allow you to reserve material via My library as, in your profile, you did not choose e-notification about availability of reserved material (e-mail or SMS) under your settings. Please set the e-notification parameters in My library (in the E-notification window) or contact your library.*
- Under "Status O" the default text of the first part of the message which is displayed in case of successful reservation of available material is: *Your reservation request received.*
- Under "Status O – valid to" the default text of the second part of the message which is displayed in case of successful reservation of available material is: *Your selected material will be waiting for you in your library until;* reservation expiry date will be automatically added at the end of the text
- Under "Status O – note" the default text of the third part of the message which is displayed in case of successful reservation of available material: *It is recommended to check loan status before collection.*
- Under "Status R" the default text of the first part of the message which is displayed in case of successful reservation of unavailable material: *You reserved currently unavailable material. Once it becomes available, you will be notified by the selected method of notification.*
- Under "Status R – valid to" the default text of the second part of the message which is displayed in case of successful reservation of unavailable material is: *Material reserved until;* reservation expiry date will be automatically added at the end of the text.

2.6 RESTRICTIONS ON OPERATIONS

Various restrictions on operations during loan procedures can be maintained by the **Home library / Restrictions on operations** method. You can define the validity of some restrictions for all members of the same category (e.g. membership validity period). You can also define the validity for other restrictions for all material of certain type (e.g. restricted number of reservations). In libraries with departments it is possible to define different restrictions for each department, except those types of restrictions which refer to membership validity.

You can define:

- Restricted number of copies on outside loan
The restriction is taken into account for outside loan. If the restriction has already been set up for the member under "No. of copies on loan restr. (LOAN)", it has priority over the restrictions specified for that member category.
- Restricted number of copies on reading room loan
The restriction is taken into account for reading room loan. If the restriction has already been set up for the member under "No. of copies on loan restr. (LOAN)", it has priority over the restrictions specified for that member category.
- Restricted number of loan renewal periods in COBISS/OPAC
The restriction is taken into account while renewing loan periods in the My library service in COBISS/OPAC. If the restriction has already been set up for the member under "Renewal lim. (LOAN)" it has priority over the restriction specified for that member category.
- Restricted number of renewals in library
The restriction is taken into account while renewing loan periods in library. If the restriction has already been set up for the member under "Renewal lim. (LOAN)" it has priority over the restriction specified for that member category.
- Restricted number of renewals via automated phone service
- Restricted number of renewals via self-checkout service
- Restricted number of reservations for member for reservations in library
You will set up the restriction if you wish to limit the number of reservations of available and unavailable material for the member. The restriction is taken into account when reserving material in a library. If the restriction has already been set up for the member under "No. of reservations restr. (LOAN)", it has priority over the restriction specified for that member category.

- Restricted number of reservations for member for reservations in COBISS/OPAC

You will set up the restriction if you wish to limit the number of reservations of available and unavailable material for a member in COBISS/OPAC. If the restriction has already been set up for the member under "No. of reservations restr. (LOAN)", it has priority over the restriction specified for that member category. If the number of reservations in COBISS/OPAC is not defined and the restriction is defined for reservations in library, the latter will be taken into account for the member.

- Restricted number of reservations of material

You will set up the restriction if you wish to limit the waiting lists for reservations of unavailable material. Enter the maximum number of members that can be added to the waiting list. The restriction will be taken into account when reserving material both in a library and in COBISS/OPAC.

- Membership expiry date

You will define it in libraries where membership expiry is related to some specific date (e.g. end of school year). The date which is defined in that way will be taken into account when recording membership validity automatically, i.e. when renewing membership and recording debt for membership automatically. This date is not taken into account for those member categories for which you defined membership validity period.

- Membership validity period

Membership validity period is taken into account when recording membership validity automatically, i.e. when renewing membership and recording debt for membership automatically. It is possible to define different periods for each member category. The period is entered as *no*, where *n* stands for number and *o* for period (d – day, w – week, m – month, y – year, e.g. 3m is for three months.)

Procedure

1. In the **Home library** class select the method **Restrictions on operations**. The **Select restriction type** window will open.
2. Highlight the restriction and confirm the selection by clicking the **OK** button.

If you selected restriction type *Restricted number of copies on loan – outside loan* or *Restricted number of copies on loan – reading room*, a window will open where you will define whether the restriction will be applied to the department or to the whole library (Home library).



Note:

If you defined that the restriction would apply to a whole library (in a library with departments), you do not need to define restrictions for each

department in the library. However, if you defined the restriction for the whole library and for each department at the same time, only the restriction defined for each department will be taken into account.

3. The window for entering restriction will open.

- If you selected a restriction that refers to restricting the number of copies on loan, you can define different restrictions for individual types of material (rows in the table) and for individual member categories (column in the table). Restrictions for individual "subtypes" of material (e.g. *books – fiction*) will be taken into account on the basis of entry to subfield 675s. If you enter subject code to subfield 675s ("UDC – Statistics") 82 (fiction), 78 (music) or 79* (entertainment), it is recommended to enter restrictions for "subtypes" of material as well.



Tip:

It is possible to define the highest possible number of items on loan regardless of the type of material. This number is entered into the row "max. total number".

If there are certain restrictions set up for the maximum number of items on loan for each type of material, these restrictions are also taken into account. In this case, the member can borrow the maximum number of items of a certain type of material, and the total number of all items on loan must not exceed the number, defined by the total restriction.

- If you selected a restriction that refers to the number of loan renewals or to the number of reservations for the member, a window will open where you can define different restrictions for each member category (rows in the table). In libraries with departments you can define different restrictions for individual departments (columns in the table), but in that case you do not enter restrictions for the home library at the same time (1st column of the table).
- If you selected a restriction that refers to the number of reservations of material, a window will open where you can define various restrictions for individual types of material (rows in the table). In libraries with departments you can define different restrictions for individual departments (columns in the table), but in that case you do not enter restrictions for the home library (1st column of the table).
- If you selected the restriction *Membership expiry date*, a window for entering the date will open.
- If you selected the restriction *Membership validity*, a window will open where you can define different restrictions for individual member categories (rows of the table).

**Tip:**

If the same restriction applies for example to all member categories, you can copy the value by entering it to one table cell, then select it with the mouse and press the keys <Ctrl <C>, then select the table cells where you wish to copy the value and copy the value by pressing the keys <Ctrl> <V>.

4. Save the changes by clicking the **OK** button.

- **General**
- **Schooling, employment**
- **Membership**
- **Info**



Tip:

When entering data, you can move between fields by using the <Tab> key. To open drop-down lists you can use the <down> key, coded data can be entered without opening the code list, if you know the codes, etc.

3.1.2.1 Entering general data

To enter general data, use the **Member/General** editor.

Procedure

1. Under "First name" and "Surname", enter the name and surname of the library member. The first letters must be capitalised. The entry of this data is mandatory.



Tip:

To enter diacritic characters, press the <Ctrl> + <S> keys and select the desired character in the **COBISS character set** window (the procedure is described in the *COBISS3 Basic Guidelines User Manual*, chapter 6.1.2).

2. Under "Date of birth", enter the date of birth. The data is mandatory due to checking for possible duplicates.

If the database already contains a library member with the same surname, name and date of birth, a new window will open containing a warning message and data on the member(s) with identical details.

Upon the library's request, it is possible to make this data non-mandatory by setting up a special parameter. In this case, only the name and surname of the library member will be used to check for duplicates.

3. Select the gender of the library member from the drop-down list.
4. Under "Citizenship" enter the citizenship designation or find it and copy it from the code list.
5. Under "Guardian/guarantor", enter the name and surname of the parent or guardian of preschool, primary-school or secondary-school children or a guarantor for a foreign citizen.

Upon the library's request, it is possible to make this data mandatory for preschool and primary-school children, as well as for the member category *013 – foreign nationals* by setting up a special parameter.

6. Under "Municipality of perm. add.", enter the code for the municipality of the permanent residence of the library member. If you do not know the code, you can find it and transfer it from the code list.
7. In the drop-down list, select the member category. The data is mandatory.



Note:

For preschool, primary-school and secondary-school pupils, the category you selected will be checked according to their age. A warning message will appear, if:

- a preschool pupil is older than 7*
- a primary-school pupil is older than 15*
- a secondary-school pupil is older than 19*

8. By clicking the **Superior member** button, you can define the relationship to the superior member (for library members of the category *019 – family card*) or partners (for library members of the category *125 – legal entities – external institutions*) (see chapter 3.1.3).
9. By clicking the **Note** button, a new window will open which you can use to enter a note on the member. Several notes can be entered and the software will automatically record the date of entry, username of the librarian who entered the note and, in libraries with departments, the department where the librarian was logged in.
10. By clicking the **Privileges** button, a new window will open where you can highlight the member's privileges.

A member's privileges are:

- Access to OCLC database

If this privilege is granted, the member can access OCLC database via COBISS/OPAC. The privilege can be granted only by the authorised person in the library who signed the membership agreement and has the privilege *LOAN_OCLC – Granting privilege to access OCLC databases*.

- No membership fee

If the privilege is granted to the member, membership fee will not be charged when registering a new member or when their membership expires. Since charging a membership fee is related to a member category, it is recommended to grant the privilege only to individual member categories for which the membership fee is normally charged.

- No loan fee

If a member has this privilege, a loan fee that is normally charged to other members for that type of material will not be charged when you put material on loan or renew the loan period for that member.

- No overdue notices

If this privilege is granted, the member will not receive an overdue notice for the expired loan period, and no costs will be charged for overdue notices.

- No fine

If a member has this privilege, the fine will not be charged when returning material or renewing loan period.

- No reservation fee

If a member has this privilege, a reservation fee will not be charged when allocating reserved material.



Note:

To edit these privileges, the privilege LOAN_PRV1 – Granting privileges to members is required. If you do not have the LOAN_PRV1 privilege, you can only see the granted privileges, but you cannot change them.

11. By clicking the **Restrictions** button, a new window will open where you can highlight the member's restrictions.

The following restrictions can be applied to a member:

- Entry denied

If this restriction applies to the member, no other procedure except returning material can be performed in the **Home library material** window. Before the **Home library material** window opens, a warning message will be displayed. The member cannot renew loan period or reserve the material via COBISS/OPAC due to this restriction.

- Internet access only

If the restriction applies to the member, no other procedure except returning material and entering internet access can be performed in the **Home library material** window (the COBISS3/Loan module does not support this feature yet). Before the **Home library material** window opens for the member with this restriction, a warning message will be displayed. The member cannot renew loan period or reserve material via COBISS/OPAC due to this restriction.

- Outside loan not allowed

If this restriction applies to the member, you cannot put the material on outside loan (the **Outside loan** radio button is not active in the **Home library material** window), but you can put it on reading room loan. The member cannot renew loan period or reserve the material via COBISS/OPAC due to this restriction. Before the **Home library material** window opens for the member with this restriction, a warning is displayed.

- Renewal denied

If this restriction applies to the member, it is not possible to renew the loan period for the material on loan (the **Renew** button is not active in the **Home library material** window). However, you can change the expiry date by double clicking the expiry date and entering a new one. The member cannot renew loan period or reserve the material via COBISS/OPAC due to this restriction.

- COBISS/OPAC reservation denied

If this restriction applies to the member, he/she cannot reserve the material via COBISS/OPAC, however he/she can reserve the material in the library.

- Membership card retained

This restriction is set up automatically in case of self-check-out abuse, but it can be set up manually as well. If this restriction applies to the member, no procedure can be performed in the **Home library material** window, except returning material. Before the **Home library material** window opens, a warning message will be displayed. The member cannot renew loan period or reserve the material via COBISS/OPAC due to this restriction.

- Membership card lost

Set up this restriction if a member lost his/her membership card and uses a duplicate with the same number. Before the **Home library material** window opens, a warning message will be displayed. That way you can check the card and prevent possible abuse if the original membership card was stolen.

- Membership card found

Set up this restriction if the membership card that a member lost or forgot somewhere has been found. If the restriction *membership card lost* was set up before that, cancel it. It is recommended to enter the location of the membership card to the note about the member if the library has several separate departments. Before the **Home library material** window opens, a warning message will be displayed. Once the membership card is returned to the member, cancel the restriction.

- No access to information resources

If the restriction applies to the member, it is not possible to access external providers of information resources. These settings refer to the libraries that signed the statement to access foreign services and have remote access available.

- ILL requests via COBISS/OPAC not allowed

If the restriction applies to the members, he/she cannot submit interlibrary loan request via COBISS/OPAC.

- Self-checkout not allowed

If the restriction applies to the member, he/she cannot use the self-checkout service; however the member can use the services at the lending desk in the library.

- No access to databases of members

If the restriction applies to the member, the member does not allow access to his/her data in the other databases (this currently applies to the Ljubljana City Library, which uses the reference database Urbana).



Note:

To edit these restrictions, the privilege LOAN_PRV2 – Imposing restrictions on members is required. If you do not have the LOAN_PRV2 privilege, you can only see the restrictions, but you cannot change them.

12. Under "No. of copies on loan restr. (LOAN)" enter the maximum number of copies that the member can have on loan.
13. Under "Renewal limit (LOAN)" enter the number of renewals allowed to the member after the loan period expires
14. Under "No. of reservation restr. (LOAN)" enter the maximum number of reservations for the member. In libraries with departments all reservations in different departments are taken into account.
15. Under "Language of overdue notices", select one out of five different language versions, based on which an overdue notice will be created for the member. If the data is not changed for the member, the member will receive an overdue notice in his/her domestic language, which is a default value for this attribute.
16. Under "Outstanding debts", "Current overdue notices", "Lost material (LOAN)" and "Date of last visit" the data is entered automatically. You can only change the data under "Lost material (LOAN)". By doing so, you also delete the note indicator LST.
17. Under "Date of last visit" the date of the last visit is displayed regardless of whether the visit was recorded in the library or outside the library (e.g. in COBISS/OPAC) and regardless of the department in which it was recorded.

3.1.2.1.1 Entering addresses

You can enter data on addresses by clicking the **Addresses** tab and then using the **New object** method. A new window will open where you can choose the postal address, e-mail address and telephone number. Depending on the selection, a window will open where you can enter the data from the address.

You can specify the following:

Procedure

1. By clicking the **Use** button, a window will open where you can specify what the address will be used for; you can select several uses for the same address. The value for the attribute "Use" is not mandatory.



Note:

The use can only be specified for postal addresses. The use of e-mail addresses and mobile phone numbers is specified in the settings for electronic notification.



Note:

*If the guardian/guarantor's address is entered for addressing overdue notices and the library member already turned 18, a message is displayed when you switch to the **Member** editor and when saving data on the member.*

When the member turns 18, regardless of the settings, the overdue notices will be addressed to the name and surname of the member and no longer the guardian/guarantor. This does not apply to members in the category 013 – foreign nationals.

2. From the drop-down list, select the type of address or telephone number.
3. Under "Street and No.", enter the data on the street and street number. The data is mandatory.
4. Under "Postcode and city", enter the postcode or find and transfer it from the code list. In the case of foreign nationals, type in the postcode and city. The data is mandatory.
5. Under "Country", enter the country code or find it and transfer it from the code list.
6. Under "Telephone number", enter the telephone number.
7. Under "Phone number type", select the type of telephone number from the drop-down list.
8. Under "E-mail", enter the e-mail address.



Note:

Entering the permanent postal address of the member is mandatory. Upon the library's request, it is also possible to make this data non-mandatory.



Note:

*The addresses for e-notification (e-mail address and mobile phone number) are entered in the **E-notification** window, which you can open by clicking the **E-notification** button.*



Tip:

If you wish to print a label with a member's address on it, find the member in the **Member** class and select the **Object / Print label with member's address on it** method (see also COBISS3/Interlibrary Loan User Manual; chapter 5.3.2).

3.1.2.1.2 Entering addresses for e-notification

Enter addresses and settings for electronic notification in a special window that will open after you click the **E-notification** button. You can enter e-mail address and mobile phone number and define which types of notifications the library member will receive by e-mail or SMS. Settings for individual notification types depend on the types of notifications available in your library (see chapter 2.4).



Note:

As a rule, addresses and settings for e-notification can be set up by the library members in My library via COBISS/OPAC online.



Note:

As members can set the settings for push notifications through their mobile version of COBISS/OPAC, the settings in the Push notification column cannot be changed.



Note:

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

Options

You can check for a member if it is possible to send SMS notifications to the number for SMS notifications, entered under "Mobile phone number". Sometimes members who used to have SMS notifications blocked are convinced that the receipt of SMS notifications is no longer blocked, but they still do not receive SMS notifications. By clicking **SMS test** in the **E-notification** window, a test message is sent to the number for SMS notifications. If the member confirms that he/she received the message, it means that messages are no longer blocked and he/she should be receiving SMS notifications. If the member does not receive the test SMS notification, it means that commercial messages are still blocked, so he/she should contact the mobile provider to unblock messages.

The test SMS notification is sent free of charge.

3.1.2.1.3 Entering alternative or invalid identification numbers

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

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

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

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



Tip:

The membership card number of a deleted member or a deleted alternative number, which was saved to invalid numbers, can become available by finding the invalid number and deleting it by using the **Delete invalid number** object method.

3.1.2.1.4 Entering the COBISS/OPAC password

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

3.1.2.2 Entering data on schooling and employment

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

Procedure

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

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



Note:

*If your library falls within eVŠ (Evidential and analytic information system for higher education in the Republic of Slovenia), the entry of data on schooling in the eVŠ system is enabled by turning on a special parameter in the **Schooling, employment** tab (see chapter 3.1.2.2.1).*

2. Under "University" enter the university code or find and transfer it from code list of universities.

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

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

4. Under "Class/grade", enter the class or find it in the code list, which opens depending on the selected type of school, and transfer it.
5. Under "Course of study", enter the course of study or the training programme or find it in the code list and transfer it. You have to create the code list of courses of study yourself (local code list *Study programme (CODE 313)*), while the code list of universities is common to all the libraries.
6. Under "Level of study", enter the level of study or find and transfer it from the code list.
7. Under "Company of employment", enter the name of the institution in which the library member is employed, or find it and transfer it from the code list you created (local code list *Institutions, companies (CODE 303)*).



Note:

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

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

3.1.2.2.1 Entering data on schooling in the eVŠ system

Libraries of the universities in the eVŠ system (Evidential and analytic information system for higher education in the Republic of Slovenia) can enter the eVŠ data by a special parameter in the configuration file. In these libraries, in the **Member** editor, you can specify data on the university, study programme, study programme B and mode of study by selecting appropriate values from the drop-down lists. The study programme drop-down lists will open according to the selected university. If you change the university, the selected values under both study programmes will be deleted.

3.1.2.3 Entering membership data

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

Automatic control of membership validity is activated upon the library's request with a special parameter. In this case, a warning message will be displayed when registering a new member or if a member whose membership

expired visits the library; at the same time it is possible to record membership validity automatically. If you charge membership fee in the library, you must enter the price for membership fee and admission fee (see chapter 7.1 and 7.2.2.1).

Procedure

1. Under "Library code", the library code is entered automatically depending on the parent library. The data cannot be changed.
2. Under "Department", the department is entered automatically depending on the department in which you are signed in; the data is only entered for those libraries, which have loan facilities available in several departments. The data cannot be changed.
3. Under "Mobile library stop", the mobile library stop where you are logged in when entering loan procedures in the mobile library will be automatically entered. The data can be changed manually.
4. Under "Membership start date", the current date is entered automatically. You can change the data, if the date entered is not the membership start date.
5. Under "Membership renewal date", leave the field blank. If you keep records on membership validity in the library or if you charge membership or admission fee, the current date will be entered when registering membership validity automatically or when entering debt for membership or admission fee. If it is a library member you wish to transfer from old library member records, you can enter the last membership renewal date manually.
6. Under "Membership expiry date", leave the field blank. If you keep records on membership validity in the library or if you charge membership or admission fee, the new membership expiry date will be entered when registering membership validity automatically or when entering debt for membership or admission fee. This date is calculated on the basis of membership validity period for member category or generally valid membership expiry date will be taken depending on the settings in the **Restrictions on operations** class. If the membership validity is not explicitly specified, the default period is 1 year. Automatically calculated membership expiry date can be changed according to your needs by entering a new one manually. If it is a library member you wish to transfer from old library member records, you can enter the membership expiry date manually.
7. Under "Membership validity", enter the code for the membership validity time period or find it and transfer it from the local code list *Type of membership fee – individual (CODE 318)*. The data that you enter will be taken into account when calculating the membership expiry date and entering an individual membership fee for the member.
8. Under "Statement signed", tick the check-box to indicate whether the member signed the membership statement or not. If you use a signature pad, the tick will be placed automatically when the member confirms the signature entry on the signature pad.

**Tip:**

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

3.1.2.4 Data on member conduct

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

- Under "Departments", the codes of the library departments that the library member visits are displayed. The data is only displayed for libraries in which loan is organised in separate departments.
- Under "No. of copies on loan (LOAN)", the number of the member's copies currently on loan will be displayed.
- Under "Date of last overdue notice", the date of the last sent overdue notice will be displayed.
- Under "No. of overdue notices received", the number of overdue notices received by the member up to that day will be displayed.
- Under "Received overdue notices ", the box will be ticked if the member received at least one overdue notice up to that point.
- Under "No. of visits a year (LOAN)", the number of library visits of the member in the current year will be displayed.
- Under "Entered by", the username of the librarian who created the record on the member will be displayed.
- Under "Entered", the date of record creation will be displayed. The date is equal to the date of the first entry, if the library member actually joined the library on the same day as his data was entered to the database.
- Under "Modified by", the username of the librarian, who entered the last change of the member details, will be displayed.
- Under "Modified", the date of the last change of the member details will be displayed.
- Under "Access to info. res.", a list of groups of information resources is displayed to which the member has access to. The settings for the access are defined in accordance with the requirements of the individual library with special parameters in the configuration file. If the member does not have access to information resources, the reason will be displayed (e.g. *Outstanding debts*).
- Under "Departments – details", if the loan is organised in separate departments within the library, the data regarding the member conduct

will be displayed for the separate departments which the member visits (department number, date of last visit, no. of copies on loan, date of last overdue notice, no. of overdue notices received, number of copies lost, no. of visits a year).

3.1.2.5 Transferring member details from the reference students database

Creating a reference students database is described in chapter 3.9.

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

Procedure

1. In the **Membership card number** window, set up the identification number assignment method (see chapter 3.1.1).
2. Highlight the "From students database" button.
3. Find the record on the student in the reference database. You can search by the user number, membership card number, name or last name. Your search can be truncated by using an asterisk.
4. The window with a list of records on students will open.
5. Double-click the record on the student to open it.

The **Member** editor will open.

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

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

3.1.3 Defining a superior member

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



Tip:

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

3.1.3.1 Family card

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

Procedure

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

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

If the category of the superior member is not *019 – family card*, it will be changed to that category automatically.

If you wish to copy the permanent postal address of the superior member, answer the question in the **Address transfer from superior member details** window affirmatively.

3. Save the member details.

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

3.1.3.2 Legal entity card

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

Procedure

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

2. Find and select the partner.

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

3. Save the member details.

3.1.4 Registration form

The library can decide to sign registration forms with the signature pad and save these documents in electronic form.



Note:

This functionality can only be used with the corresponding technical equipment for the electronic signature of documents. The COBISS3 software supports the Omega signature pad by Signotec. It is not necessary to separately install the signature pad or set it up. The signature pad just needs to be plugged into the USB-port of the workstation.



Procedure


4. When adding a new member or updating the member data in the **Member** editor, click the **Registration form** button that starts the preparation of the registration form.
5. The **Overview and sending of created report** window will open. The created registration form that has not been signed yet can be checked and, if necessary (e.g. upon the member's request), printed.
6. To start the procedure of signing the registration form, right-click to open the menu on the "Registration form" report in the **Overview and sending of created report** window and then select the **Sign document** method.



Note:

*If the signature pad is not plugged into the USB-port of the workstation, a message will appear once you confirm the **Sign document** method.*

7. The **Signature** window will open, where you click the **Start** button. By doing so, you activate the signature pad and hand it to the member to sign within the box. If the member didn't sign it correctly, the screen can be refreshed with the  arrows and sign again. The member can cancel the signing procedure with the red cross .

When the member signs the pad, the signature must be confirmed by clicking the green tick  with the pen. By clicking, the member confirms that the registration form was signed. The signed registration form is thereby signed.

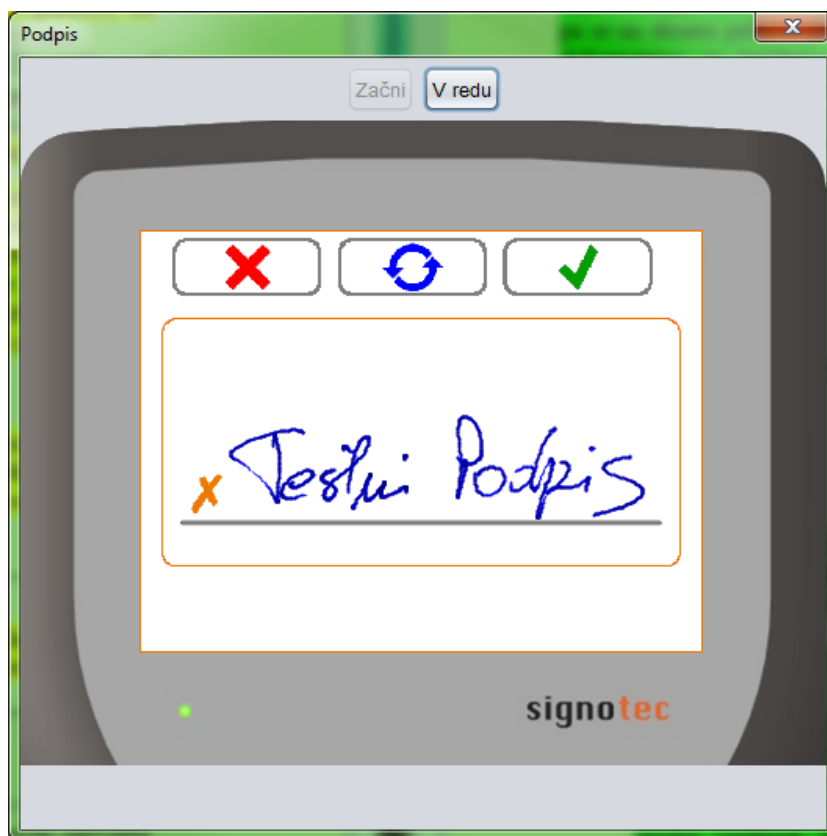


Figure 3.1.4-1: Signature window after the member's signature



Tip:

If the registration form must be signed by two people (e.g. the member and the guarantor in the case of a foreign national or the member and the guardian in the case of an underage person, etc.), two people can sign in the box on the signature pad, but both signatures must be entered before they are confirmed with the green tick, as it is not possible to add an additional signature after the confirmation, when the registration form is saved. However, you can create a new registration form with two signatures.

8. The **Signature** window is refreshed once the signature is confirmed and the signature cannot be changed anymore. Neither can the procedure of creating a registration form be cancelled. The librarian completes the procedure of creating a signed registration form by clicking the **Close** button or the cross for closing windows.



Tip:

The **Start** and **Close** buttons can also be confirmed on the keyboard with the space bar.

The *Registration form* document will open on screen in PDF-format. If necessary, you can check, print, etc. the document. Before you continue with your work, close the document and also the **Printing** window.

On the **Membership** tab under "Statement signed" a tick is added automatically.



Note:

*In order for the data on the member, for whom you are creating the registration form, to be saved, you must click the **OK** button in the **Member** editor after finishing your work with the registration form.*



Note:

It is not possible to delete electronically saved registration forms individually. All saved registration forms are deleted automatically when members are deleted (either individual or batch deletion of inactive members).

Options

You can also create and print a registration form if you find the member in the **Member** class and then select the **Object / Print** method or the **Object / Send** method.

3.1.4.1 Registration form contents and form

The form of the registration form can partially be adapted to the needs of an individual library. For this purpose, new variables were added to the standard definitions were added to the standard definitions for loan in the COBISS3/Reports software module (**Report variables / Standard / Loan** folder) in the **Registration form** folder:

- *Registration form name*, which enables changing the default name REGISTRATION FORM (e.g., you can change it to REGISTRATION STATEMENT etc.)
- *Member statement on the registration form*, which enables preparing the registration form text, adapted to the individual library (e.g. for stating the conditions of membership, use of personal data, etc.); the default value of the standard definition is blank.
- *Note on the registration form*, which enables entering additional remarks at the end of the registration form, i.e. below the member's signature; the default value is blank.

Select, copy and paste the variables, the values of which you wish to change, and paste them to the folder, created for this reason, among the user definitions.

The form and content of the registration forms depends on which data on the member is entered. The data on the registration form is divided into four categories.

Basic data:

- membership card number
- department
- member category
- superior member/partner

Personal data:

- name
- surname
- date of birth
- gender
- citizenship
- guardian/guarantor's name and surname
- municipality of permanent address

Addresses (street and number, postcode and city, country, VAT ID No./Tax No.) and other contact details:

- permanent address
- temporary address
- work address/head office
- guarantor's/guardian's address
- guarantor's/guardian's address and permanent address
- guarantor's/guardian's temporary address
- address abroad
- phone
- mobile phone
- e-mail address
- VAT ID No./Tax No.

Other data (schooling, employment):

- university
- school/faculty name
- course of study
- university in eVŠ
- study programme in eVŠ
- study programme in eVŠ – B
- level of education
- employment
- department of employment



Tip:

The library can decide to include their logo on the registration form. The logo will be displayed in the registration form header. To include the logo on registration forms, the library must send the logo, defined as an image, saved in jpg or gif format, maximum size 25 x 176 mm.

If the library decides to include their logo on the registration forms, the logo will also be displayed on overdue notices in A4 format (see chapter 8.5.1).

3.1.4.2 Accessing electronically saved registration forms

You can view and print the saved registration forms.

Procedure

1. Find and select the member in the **Member** class.
2. Select the **Object / Archive of e-documents** method.

The **Overview of e-documents** window will open with the list of saved registration forms. The following data is displayed for each registration form: "<document name>; entered: dd.mm.yyyy; entered by: <username>". If there are several registration forms saved for one user, the data for each registration form will be displayed in a separate row. The most recent registration form is at the top of the list.

3. Select one or more delivery notes. Next, click the **OK** button to display the selected registration forms in PDF format. If you selected several registration forms, every registration form is displayed in a separate document. You can view or print the registration form.
4. If you wish to cancel the process of reviewing e-documents, click the **Cancel** button.

4.1 SELECTING A MEMBER

To access the **Home library material** window:

Procedure

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

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

2. You can search for a member in two different ways:

- by identifying the library member through the membership card number

Type in or use the reader to enter the membership card number in the **Search by key** window. You can also enter the alternative membership card number (e.g. student card number). In this case, the alternative numbers for the members must be recorded previously.

- by using some other type of data

In the **Search by key** window, leave the entry field blank and click the **OK** button. The member search window will open, which you can use to search for the member (e.g. by name and surname).

You can also access the member search window, if the number you entered does not exist in the members' records.



Tip:

If the member is already on your workspace, use the mouse to highlight it and then use the **Home library material** method from the shortcut menu.

When you select the library member, some programme controls are performed and the corresponding warning messages are displayed:

- If the restrictions *Entry denied* or *Internet access only* are set up for the member, a notification will appear. In case of these restrictions you can only return the material from the **Home library material** window or you can change the restriction for the member in the **Member** editor.
- If a member has the restrictions *Outside loan not allowed*, *Membership card retained*, *Membership card lost* or *Membership card found*, a notification will appear.
- If a member has the restriction *Outside loan not allowed*, the **Outside loan** button in the **Home library material** editor will be inactive; if a member has the *Membership card retained* restriction, the **Lend**, **Renew** and **Reserve** buttons will be inactive, and if a member has the *Renewal denied* restriction, the **Renew** button will be inactive.
- If outstanding debts, which were not settled within the defined period, are entered for the member, a notification will appear. There are no

restrictions for loan procedures. The period is defined by setting up a special parameter upon the library's request.

- If the library member turns 18 and the type of mailing address for overdue notices is set to the guarantor's/guardian's address, a message will be displayed.

If a member is included in the members' records, the **Home library material** window will open.

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 include the attribute values "Class/grade", "Course of study", "Department of employment", "Date of birth" and "Special note" for each library member (in libraries that use a common members database). It is also possible to display several attributes at once (e.g. member category and date of birth). 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 or expiry data of other loan statuses (e.g. *L – lost*)
- 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

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.



Tip:

The library can decide that the **Home library material** window remains open once you confirm the return of material. This option can be turned on upon the library's request with a special parameter.

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.

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

Procedure

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.).

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

6th column – **All departments**

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

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

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

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

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

8th column – **Outstanding debts**

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

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

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

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

- 0 – without borrowed material
- 1 – with borrowed material

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

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

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

11th column – **Preview**

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



Tip:

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

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

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

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

You can choose between four different types of data:

1. **Data on department/additional data**

Data on the library name or the superior partner (if specified in the home library) will be displayed on default lending forms and invoices. Right below the library name, the address and contact details of the library department will be displayed. If the library does not have departments, the address and contact details of the home library will be displayed by default (phone, FAX and e-mail).

The library can use a new content version to replace the default data on the department and the contact details with other text. In this case, the desired content must be entered for this type of data. If a library with departments wishes that the department name is also displayed, they

must include the variable value %library department% or enter the department name manually.

2. Additional member data

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

3. Note on invoice

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

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

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



Note:

In libraries that are liable for fiscal verification of invoices, the display of data on the person who borrowed the material is obligatory. For this reason, it is best not to change the default settings.

COBISS Koper - Capodistria, 23.09.2016 11:02:05

Univerza na Primorskem Univerzita' del
Litorale
Titov trg 4
6000 Koper - Capodistria
ident. št. za DDV: SI10044264

Knjižnica TEMENA
Glagoljaška 8
6000 Koper - Capodistria
tel.: +386 5 611 75 72
faks: +386 5 611 75 71
e-pošta: temena@upr.si

← 1. Data on department/additional data

0302007 Član Testni
Datum poteka članstva: 25.04.2017
Fakulteta za turistične študije - Turistica

← 2. Additional member data

**RACUN št.: PROSTORODDI-
ENapraval-20150268**

obveznost	kol.	neto cena	skupaj
fotokopije - A4 ba	10,0	0,50	5,00 C
4. opomin	1,0	4,00	4,00 A

DDV
za plačilo EUR 1,10

gotovinsko plačilo EUR 20,00
vračilo EUR 9,90

osnova	stopnja DDV	znesek DDV
5,00	C DDV 22 %	1,10
4,00	A Oproščen promet	0,00

znesek klavzula za oprostitev DDV
4,00 Oproščeno DDV v skladu s 13.
tč. 42. člena ZDDV-1

Dolgovi so v celoti poravnani!

← 3. Note on invoice

SEZNAM GRADIVA

Evidentirano gradivo	vrniti do/tip
Matematični priročnik /	03.10.2016/ knj
Matematika I	03.10.2016/ knj
Management and	03.10.2016/ knj

Bibliotekar/ka:
Marko Kušar

Hvala za obisk in nasvidenje!

Umik knjižnice:
pon-pet: 8.00-18.00
sob: 7.30-13.00

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

ZOI: a2be09a7c000d24bb327847b2bc6ee28
EOR: f6da1c57-be40-4daa-b074-e9d78c0fcd6c



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

4.11 INSIGHT INTO THE LIBRARY MATERIAL STATUS

In the **Home library material** window you can get the information on who borrowed or reserved the material for an individual copy in the list of recorded material. If there is a list of reservations for the borrowed or reserved material, you will also get information about who else reserved the material.

Procedure

1. Find and select the item in the **Home library material** window.
2. Click the **View** button.

The **Insight into the library material status** window will open displaying first the basic data on material (title, author, publication year and language of publication for monographs, or title, ISSN, language of publication and publisher for serials) and then the following:

- accession number
- date of loan or reservation entry
- last loan renewal date
- loan due date or reservation due date
- loan status
- data on library member or partner who has borrowed or reserved the material (for the member, the membership card number, name and surname of the library member will be displayed; for the partner, the symbol of the partner will be displayed)
- ILL request number (only if the material is reserved for interlibrary loan or borrowed through interlibrary loan)

If the material is reserved, the list of reservations will be displayed. In this list, date of reservation, data on the member or partner, for whom the material is reserved, ILL request number (in reservation for interlibrary loan) will also be displayed. In libraries with departments the data on the department in which the reservation has been recorded will also be displayed.

Options

You can also view the library material status, if you click the **View** button in the **Catalogue** window. In that way, you will get information on who borrowed the item and information on possible reservations.

You can also check the loan status for an individual copy of material by finding it in the **Field 996/997** class. If the copy is unavailable, data on loan or reservation (**On loan/reserved** folder), possible list of reservation for this material (**Reservations** folder), data on the member or partner, who has reserved or borrowed the material, and the ILL request number (only if the material is reserved for interlibrary loan or borrowed through interlibrary loan) are accessible from the related objects.

7 CASH REGISTER OPERATIONS

The chapter describes cash register operations in the COBISS3/Loan module.

Subchapters:

- Managing price list
- Entering debts
- Settling debts and printing invoices
- Overview of debts
- Deleting debts
- Cancelling debt settlement
- Repayment (credit note)
- Closing out cash register and printin list of invoices
- Overview of cash register transactions
- Fiscal verification of invoices
- Displaying data on issued invoices

overdue notice), for notification about available reserved material and for reservation of available copies to this group.

- Services/debts – other (LOAN)

This group contains prices for services that are not related to price classes, e.g. prices for photocopies, lost material, etc. If a library uses the COBISS3/Interlibrary Loan software module, a special service for interlibrary loan must also be entered to this group (see chapter 7.1.1.2).

- Services/debts (ILL)

You will enter prices for interlibrary loan services to this group. 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. If you selected *exempt from VAT* under “Tax rate”, you must select the appropriate clause under “Exemption clause” from the local code list. The selected clause will be displayed in the summary section of the invoice together with the amount to which the VAT exemption applies.



Note:

The exemption clause can be entered if you previously defined the local code list VAT exemption clause (CODE 323). It is recommended that the clause code has one digit.

8. Select whether 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.

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



Note:

*If a library uses the COBISS3/Interlibrary Loan software module you must enter the service OTHILL in the price list under the **Services/debts – other (LOAN)** tab. Under »Type of service/debts«, select 99 – OTH; under »Price class«, enter the ILL designation. The price is not defined but you can enter the usual price that you charge for delivering items via interlibrary loan. Under »Tax rate«, select the value exempt from VAT; under »Exemption clause«, select the value manually.*

In libraries with departments define the service OTHILL in the price list that applies to the ILL department (i.e. the uniform price list valid for all departments, or a separate price list of the ILL department).

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.

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.

7.11 DISPLAYING DATA ON ISSUED INVOICES

Upon a tax authority official's request for tax audit purposes, the taxable person must submit data from the electronic register of issued invoices for cash operations in the mode and form prescribed in the *Rules amending the Rules on the requirements regarding software and electronic devices, on the management and operation of information systems and on the content, form, method and time limits for the submission of data (Official Gazette RS, No. 18/16)*.

In accordance with the changes made to the initial Rules from 2013 (*Rules on the requirements regarding software and electronic devices, on the management and operation of information systems and on the content, form, method and time limits for the submission of data (Official Gazette RS 35/13 and amended 42/13)*), up until the amendment of the rules, it was possible to create these two reports in the COBISS3/Reports software module in the **Data export** group. The reports are now updated and can be created in the COBISS3/Loan software module.

The data from the electronic register of issued invoices by the taxable person is entered into structured computer files in standard form with the following names:

- REPORT INVOICES HEADERS.TXT – data on issued invoices
- REPORT INVOICES ITEMS.TXT – data on items on issued invoices

Procedure

1. In the **Invoice** class, select the appropriate method:
 - **Display data on issued invoices (REPORT INVOICES HEADERS.TXT)**
 - **Display data on issued invoices (REPORT INVOICES ITEMS.TXT)**
2. In the **REPORT INVOICES HEADERS.TXT** window or the **REPORT INVOICES ITEMS.TXT** window, specify the time period.



Note:

Each file must contain data for each calendar year. If the taxing authority requests a report for several years, the report and the files must be created for each year individually. If the taxing authority requests the report with summary data in the current calendar year, the file must contain the entry of data from the day that the request was made onwards. This means that when the report and/or file is created, the date of the previous day must be entered as the end date.

3. Click the **Find** button.

Under "Number of records" the number of records in the file is displayed.

4. Click the **File location** button.

The **Select location** window will open, where you define the folder on the computer where each file will be saved.

5. Click the **Save** button.

The data is saved to the file in the selected folder. Under "File name" the location and file name are displayed.

6. Click the **Exit** button to close the window.

The Rules also prescribe the form, in which the data must be submitted:

Data are written on standard computer disks of 3.5in (1.44 MB) or on standard CDs of 700 MB or on standard DVDs of 4.7 GB. Notwithstanding the previous sentence, the person liable for tax may submit data also on other data mediums on condition that all data prescribed by these rules are provided.

The envelope of the data medium has the following data printed in a readable manner:

- *title and tax number of the person liable for tax*
- *type of data print*
- *period covered by the print of data*
- *number of prints in each file*
- *calculated condensed values of data in each file on the basis of algorithms MD5 (32 characters in the hexadecimal notation) and SHA-1 (40 characters in the hexadecimal notation)*

The calculated condensed values of data are required to ensure data identification. To calculate the condensed values in each file on the basis of algorithms MD5 (32 characters in the hexadecimal notation) and SHA-1 (40 characters in the hexadecimal notation), use tools or programs, available online free of charge (e.g. the web application <http://onlinemd5.com/>, or the MD5 and SHA Checksum Utility tool).

This data type contains the default general value *library head*. The data can be edited or you can add new content versions.

7. Price display at the end of the overdue notice

For this data type, two variable values, *%received overdue notice price%* and *%current fine%*, which have the introductory phrase, are used as default. In the place of variable values, the relevant price from the valid price list of the library or department (if the price list is different by departments) is automatically displayed on the prepared overdue notices. If a library wants to define a different price display and introductory phrases, the default data type must be edited or new content versions must be defined where the variable values will be used, in the place of which the relevant values will be automatically displayed in the group of overdue notices (see function *Insert variable value* further in this chapter).





Tip:

The library can decide to include their logo or a photo of the signature of the responsible person in the library on the overdue notice report in A4 format.

The logo will be displayed in the overdue notice header (above the address of the overdue notice recipient. If the library decides to include their logo on the overdue notices in A4 format, the logo will also be displayed on registration forms that are saved after the member's signature is confirmed with the signature pad (see chapter 3.1.4).

The picture of the signature is displayed under data type 6 (signature on overdue notices). The library can only use one signature on all overdue notices (it is not possible to use different signatures for each department or a certain number of overdue notices).

To include the logo or signature on overdue notices, the library must send the logo (defined as an image, saved in jpg or gif format, maximum size 25 x 176 mm) and/or the signature (defined as an image, saved in jpg or gif format, maximum size 25 x 80 mm).

 IZUM Institut informacijskih znanosti	← library logo
Testni Član Prešernova ulica 17 2000 Maribor	
Univerza na Primorskem Univerzita' del Litorale Titov trg 4 6000 Koper - Capodistria ident. št. za DDV: SI10044264 Knjižnica TEMENA Glagoljaška 8 6000 Koper - Capodistria tel.: +386 5 611 75 72 faks: +386 5 611 75 71 e-pošta: temena@upr.si umik odprtosti: vsak dan od 7.00 do 19.00	1. Additional data under the library address 3. Number (name) of the overdue notice
0402363 Testni Član Obveščamo vas, da je gradivo, ki ste si ga izposodili, potekel rok izposoje:	23.09.2016 4. OPOMIN 4. Introductory text
Rok: 20.11.2013 TI=Justifying legal punis... AU=Primorac, Igor IN=02000007673 Rok: 20.11.2013 TI=The principles of mora... AU=Bentham, Jeremy IN=02000007669 Rok: 20.11.2013 TI=Outlines of the philos... AU=Hegel, Georg Wilhelm Friedrich IN=02000007584 Rok: 20.11.2013 TI=Broken bodies, shatter... IN=02000001906 Rok: 20.11.2013 TI=Taking rights serious!... AU=Dworkin, Ronald IN=02000007581 Rok: 20.11.2013 TI=The province of jurisp... AU=Austin, John IN=02000007687 Rok: 27.11.2013 TI=Popravki pesniške zbir... AU=Potocco, Marcello IN=02000006523	5. Conclusion text
Vljudno prosimo, da vmete gradivo ter poravnate zamudnino in strošek opomina.	6. Signature on overdue notices
Cena opomina: 4,00 EUR Zamudnina na današnji dan: 14,00 EUR	
vodja knjižnice 	7. Signature of responsible person in library
	7. Price display at the end of the overdue notice

stran 1/1

Figure 8.5-1: Overdue notice template with data type display for A4 format

In the bottom part of the window is the “Field for editing the selected data type”, where the content of the data, which is displayed on the overdue notice forms, is edited. You can have different content versions saved for one data type. Each content version is in its own numbered row. For the selected data type, select the desired content version that you wish to edit. The selected content will be displayed in the bottom part of the window, where you can change it accordingly.



Note:

For the data type Additional data under the library address there is no content in the beginning.



Note:

When editing data, the % sign must not be used as it is used only for entering variable values.

Under the field for editing content of the selected data type, the following functions or buttons can be used:

- **Insert variable value**

In the procedure of editing data on forms, the previously prepared variable values can be used, in the place of which the actual value will be automatically displayed. You can insert the following variable values:

- member's total debts
Display of total debts for the member.
- debts of all overdue notices received
Display of total debts of all overdue notices received for the member.
- 1st overdue notice price
Display of the price for the first overdue notice (1ON) according to the valid price list of the library or department, if the price list is different by departments.
- 2nd overdue notice price
Display of the price for the second overdue notice (2ON) according to the valid price list of the library or department, if the price list is different by departments.
- 3rd overdue notice price
Display of the price for the third overdue notice (3ON) according to the valid price list of the library or department, if the price list is different by departments.
- 4th overdue notice price

Display of the price for the fourth overdue notice (4ON), according to the valid price list of the library or department, if the price list is different by departments.

- Current fine
Display of the current fine for the member on the day when preparing the overdue notice.
- fine for books – FIN01
Display of the price for the debt FIN01 according to the valid price list of the library or department, if the price list is different by departments.
- fine for serials – FIN02
Display of the price for the debt FIN02 according to the valid price list of the library or department, if the price list is different by departments.
- fine for non-book material – FIN04
Display of the price for the debt FIN04 according to the valid price list of the library or department, if the price list is different by departments.
- received overdue notice
Display of the relevant overdue notice number or name on the day when preparing the overdue notice
(1st OVERDUE NOTICE, 2nd OVERDUE NOTICE, etc. or e.g. DIRECTOR'S NOTICE).
- received overdue notice price
Display of the price of the overdue notice on the day when preparing the overdue notice according to the valid price list of the library or department (if the price list is different by departments).
- received overdue notice number
If you wish to name the overdue notices differently or use this option also when editing language versions for the creation of forms in other languages, you can use the variable value for the display of the numeric value of the received overdue notice on the day when preparing the overdue notice (e.g. 1 for the first overdue notice, 2 for the second overdue notice, etc.).

Example:

Example of usage:

%received overdue notice number%. notification about a loan period expiry date

In language versions, you can avoid entering different forms of one data type, as all language versions can be edited by using one content version of the data type 3. *Overdue notice number (name)*.

- **Save**

Use this button if you wish to save the changed content version.



Tip:

When editing data, you can use the *Insert variable value* function. By using this function, the selected variable values can be entered, in the place of which the actual value will be automatically displayed on the prepared overdue notices (*received overdue notice number, member's total debts, etc.*).

- **Add**

Use this button when you wish to define new content for the selected data type. You can do this by highlighting the content version under the selected data type, editing it accordingly or updating it and clicking the **Add** button. You can add more content versions for one data type. Each newly added version will get its own current number, which cannot be changed. The order is not always based on the current number.

- **Delete**

Use the button when you wish to delete the defined content version in the upper right part of the window. You can do this by highlighting the content version for the selected data type and clicking the **Delete** button. The content version for this form group will be permanently deleted.



Note:

If the content version is used in the group of overdue notice forms, it cannot be deleted. You will receive an automatic notification about where in the table the content version was used.

- **Up**

Use the **Up** button when you wish to move the selected content version in the upper right part of the window one or more rows up. When you move the content version (row) up, its current number does not change as it is determined by the content version for the data type.

- **Down**

The **Down** button is used when you wish to move the selected content version in the upper right part of the window one or more rows down. When you move the content version (row) down, its current number does not change as it is determined by the content version for the data type.

Buttons for saving and cancelling the creation of overdue notice forms:

- **OK**

Use the **OK** button to save the existing or newly created group of overdue notice forms.

- **Cancel**

Use the **Cancel** button to exit the window for editing data on overdue notice forms without saving.

8.5.1.1 Editing data on overdue notice forms

You can edit data on overdue notices for each overdue notice separately. In the **Editing data on overdue notice forms** window, you can edit data for up to four overdue notices. If a library uses fewer overdue notices (set up by a special parameter upon the library's request), the data is defined only for the number of overdue notices that are sent to its members (e.g. only for the first two overdue notices). A library does not have to edit forms for the following overdue notices as they are not taken into account in the procedure of creating overdue notices.

If a library has more automated departments, the data on forms is edited only for the departments where overdue notices are prepared by performing the procedure of creating overdue notice forms; for other departments, forms do not have to be edited.

In the **Editing data on overdue notice forms** window is a table where numeric values are displayed in individual cells for a specific overdue notice in the home library or in an individual department (in libraries with departments).

There are seven numbers in each cell, separated by a comma, which represent different data types on overdue notice forms. In the beginning, the default value in the cells is *1*; these values, which define the content of displayed overdue notices, can be changed by the library and are the basis for the creation of the report *LOAN-ON-01: Overdue notices*.

Procedure

1. Highlight with a mouse click the selected cell under the desired number of the overdue notice for the home library or for an individual department (applies to libraries with departments).
2. Then in the upper right part of the window, select the desired data type and the content version for this data type from the drop-down list. Double-click to confirm the selected content version to be used on the form. During this procedure, the current number of the content version (displayed in the beginning of the row) will be transferred to the selected cell in the place specified for this data type (e.g. data type *6. Signature on overdue notices* will be transferred to the sixth place in the cell with the current number of the content version).

Continue editing the overdue notice forms in each cell (depending on the number of overdue notices in the library), until their content is edited for all overdue notices in the home library or in individual departments (applies to libraries with departments).

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

**Tip:**

In libraries with departments, you can copy the content of an individual cell to other cells (e.g. the content of the 1st overdue notice is the same or similar to all the following overdue notices in other departments).

Perform the copying procedure by highlighting the selected cell and pressing the key combination <Ctrl> + <C>. Then highlight with a mouse click the desired cell or more cells at the same time (e.g. for all overdue notices in all departments) and paste the content by pressing the key combination <Ctrl> + <V>. If only one content version of a specific data type (e.g. 6. Signature on overdue notices) is different for an individual department, change only this content version in the selected cells of this department.

8.5.1.1.1 Language versions of overdue notice forms

A library that enables sending overdue notices to its members in different languages can edit overdue notice forms in several language versions. The overdue notice forms are created in the domestic language but you can create up to five different language versions.

Procedure

1. For the selected data type, in the upper right corner of the **Editing data on overdue notice forms** window, highlight the content version in the domestic language.
2. By clicking the right-hand mouse button, start the procedure of entering additional language versions.

The **Language versions of overdue notices** window will open, which is divided into five fields with different initial rows (1st language version, 2nd language version, etc.).

3. Place the mouse cursor on the field of the selected language version and enter the data in another language. You can enter up to five language versions of the data that will be used when creating the report *LOAN-ON-01: Overdue notices*.

During the procedure of editing data, you can also use the *Insert variable value* function (see chapter 8.5.1).

**Note:**

When editing the data, do not use the % sign, as it is used only for entering variable values.

**Note:**

*A specific language version is taken into account when creating the overdue notice for an individual member provided that the relevant language version is selected for the member in the editor (**Object /Edit method**) under the »Language of overdue notices« attribute (see chapter 3.1.2.1).*

4. Save the changes by clicking the **OK** button.



Note:

Language versions of the data must be entered for the data types for which a library wishes to be displayed on created overdue notices in one of the language versions!

8.5.2 Editing forms

Select the option of editing overdue notice forms if you wish to change or update the data on the already prepared overdue notice forms.

Procedure

1. In the **Creation of overdue notice forms** window, highlight the **Editing forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.

The **Form groups** window will open.



Note:

The default overdue notice forms cannot be edited. If a library has not yet prepared new overdue notice forms and in the beginning uses the Editing forms procedure, a notification will be displayed, informing you that editing default forms is not possible. A library must create new forms on the basis of the default forms.

3. Select one of the previously prepared groups of overdue notice forms and confirm it by clicking the **OK** button.

The **Editing data on overdue notice forms** window will open. In the title row, the name of the group of overdue notice forms that was selected for editing is displayed.

Continue the procedure of editing forms in the **Editing data on overdue notice forms** window in accordance with the instructions (see chapter 8.5.1).

8.5.3 Activating forms

In a library that does not interfere with the procedures of creating overdue notice forms, the default forms are valid. Activate new or already existing groups of overdue notices only after you have edited all the required data (also language versions, if necessary) for the group of overdue notice forms and after you have saved the data.

Procedure

1. In the **Creation of overdue notice forms** window, highlight the **Activating forms** radio button.
2. Confirm the selected procedure by clicking the **Select** button.
3. The **Form groups** window will open, where you can select one of the previously created groups of overdue notices that you wish to activate for the procedure of creating overdue notices in the report *LOAN-ON-01: Overdue notices*.

You can also select the default overdue notice forms.

4. Confirm the selected form group by clicking the **OK** button.

The currently valid form group will be displayed in the upper part of the **Creation of overdue notices** window.

8.5.4 Deleting forms

A library can delete the already prepared groups of overdue notice forms if it no longer needs them. By performing this procedure, an individual group of overdue notices will be permanently deleted.



Note:

The default overdue notice forms cannot be deleted. Also, the currently valid overdue notice forms cannot be deleted. When selecting the valid form group, you will receive an automatic notification, informing you that the group cannot be deleted.

Procedure

1. In the **Creation of overdue notice forms** window, highlight the **Delete forms** radio button.
2. Confirm the procedure by clicking the **Select** button.
3. The **Form groups** window will open, where you can select one of the prepared groups of overdue notices that you wish to permanently delete.



Note:

If there is only one group of overdue notice forms prepared in your library, an automatic question will appear asking you whether you wish to delete this form group.

4. Confirm the selected form group by clicking the **OK** button.

The forms will be deleted only after a question will appear in the window, in which you must confirm the deletion by clicking the **OK** button. You can cancel the procedure of deleting the form group by clicking the **Cancel** button.

5. The selected form group will be deleted and you will be returned to the **Creation of overdue notices** window.

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
 - LAON-ON-01: Statistics of overdue notices
- Data export
 - LOAN-EXP-01: List of uncollected debts

Subchapters:

- Creating and printing reports
- Groups and report description

A.1 CREATING AND PRINTING REPORTS

To access the COBISS3/Reports software module from the browser, select **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Loan** folder and select the group that contains the definition of the report you wish to create.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report you wish to create.

3. Select the **Creating reports / Create report** method.

The **Enter parameters for report creation** window will open. When preparing some reports, searching for records or entering the entry parameters is not required.

4. Enter the input parameters and click the **OK** button.

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



Tip:

Before printing the report, you can open and preview it on your screen by clicking the **Preview** button.

A.1.1 Creating and printing scheduled reports

The COBISS3 software enables saving jobs which can be executed later. Currently, only the *Create report* job type which enables you to define the time when the job should start is software-defined for performing scheduled jobs. Execution time for creating scheduled reports is defined in the COBISS3/Reports module, usually for larger reports that should be created outside working hours. You can access the module from the browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Loan** folder and select the group that contains the definition of the report you wish to create.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report for which you wish to create a scheduled task.
3. Select the **Creating reports / Create scheduled report** method.
Based on the selected report definition either the search window or the **Enter parameters for report creation** window will open. When preparing some reports, searching for records or entering the entry parameters is not required.
4. Find and select the reports or define the parameter values that should be taken into account when creating the report.
5. Click the **OK** button.
6. The **Edit job** window will open, where you define a new job:
 - Under "Job name", enter the name, under which the job will be saved in the list of saved jobs. Data is mandatory.
 - Under "Execution time (dd.MM.yyyy HH:mm:ss)", set up the date and time when the job should be carried out.
 - The data under "Status" is entered and changed automatically when you save the job.
 - Under "Job type", the job type *Create report* is already selected.
7. Click the **OK** button.

When you save a new job a message will be displayed about the successful registration of scheduled report creation and the job will receive the status *created*. The saved job can be edited or deleted (the procedure of editing jobs is described in the *COBISS3 Basic Guidelines User Manual*, see chapter 4.8).



Note:

Tasks that are repeated periodically (e.g. every day, every week, every month, etc.) always have the status *created* (and never get the status *completed*).

Once the report is created, a notification about the job will be sent to the e-mail of the librarian who defined the job. In case the report was not created because the conditions for creating the report were not fulfilled or because an error occurred while creating the report, a notification will be sent to the same e-mail address.

If the report is successfully created and after you receive the notification, you can find the saved file which contains the report and send it to destinations.

A.1.2 Browsing stored report files

You can find a saved file in the COBISS3/Reports software module. The module can be accessed from the browser by selecting **System / Reports module**.

Procedure

1. In the **Groups of definitions** pane open the **Reports / Standard / Loan** folder and select the group that contains the definition of the report.

In the right pane the list of definitions of the selected group will be displayed.

2. In the list of definitions select the definition of the report you created and saved as an XML-file in a predefined folder and you now wish to print or sent by e-mail.
3. Select the **Creating report / Browse stored reports** method.

The **Select report** window will open containing folders with stored reports. Under "Select folder" the name of the folder is displayed containing the saved file with the reports you created based on the selected definition.

4. In the selected folder, select the desired file with the created report- its name will be transferred to "File name."
5. Click the **Open** button.

The **Overview and sending of created report** window will open, from which you can send the prepared report to previously defined or changed destinations (the procedure is described in the *COBISS3 Basic Guidelines* User Manual; see chapter 4.5).

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, select the username (attribute "Entered by") or leave it blank, if you wish to include all usernames. 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. At the end of the reports is a summary display of cash register transactions by username and type of cash register transaction.
- **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: 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

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. 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 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)**

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. usernames³⁸: *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

³⁷ See note no. 2.

³⁸ See note no. 2.

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 ³⁹: *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 ⁴⁰: *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.

³⁹ See note no. 2.

⁴⁰ See note no. 2.

B.2.4 Active members



Note:

For statistical reports on active members the member is considered in the interim display of statistical data for each category as many times as he changed the membership category within that time period. If, e.g., he was both a primary school pupil and a secondary school student, he will be counted among the active members in each category in the interim report. In the total of all active members, however, he will only be considered once regardless of how many times he changed member category in the selected time period. Hence, the total of all results by categories does not necessary equal the total sum of the statistical report.

- **LOAN-STA-A01: Active members – by member category (school libraries)**

The report contains the statistics on active members in a 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 “Transaction” input parameter, all transactions that are considered member activities are set as default. If necessary, a different set of activities for which you wish to create the statistics of active members can be selected (e.g. only for transactions via COBISS/OPAC, etc.). The “Username” input parameter, 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. usernames⁴¹: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account when creating statistics.

- **LOAN-STA-A02: Active members – by member category**

The report contains statistics on active members in a 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 is sorted by member groups in school libraries (*Pupils or students, Students and Others*), in the LOAN-STA-Mb06 statistics, data is sorted by member categories. Under the “Transaction” input parameter, all transactions that are considered member activities are set as default. The “Username” input parameter, 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. usernames⁴²: *EBookService, OPAC, self-checkout1, etc.*). If you leave the input parameter blank, all usernames will be taken into account

⁴¹ See note no. 2.

⁴² See note no. 2.

when creating statistics. In libraries with departments you can create a report for individual departments 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. Active members are members who visited the library at least once in the selected period. Data on the number of visits is sorted according to individual municipalities by individual member category. Under the "Transaction" input parameter, all transactions that are considered member activities are set as default. The "Username" input parameter, 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. usernames⁴³: *EBookService*, *OPAC*, *self-checkout1*, etc.). 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 individual departments by entering the "Library department" parameter.

- **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 the "Transaction" input parameter, all transactions that are considered member activities are set as default. 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.

- **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

⁴³ See note no. 2.

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.