COBISS®

Co-operative Online Bibliographic System & Services

COBISS3/Loan

V6.1-00

User Manual

Institute of Information Science, Maribor, Slovenia

IZUM®

The manual includes all updates from the first published printed version of the manual in November 2007 until the present day. The contents of the manual correspond to the V6.1-00 version of COBISS3 software, and are also valid for all future software versions until they are withdrawn or another electronic version is published.

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Appendices

for reading room loan, renewing loan periods, changing due dates, returning material with or without the option of selecting library members, reserving available and currently unavailable material, returning material with restriction, recording the loss of material, printing lending forms and transferring data from the reference students database. For serials, you can specify routing lists and record routing of individual issues of serials. In libraries in which loan is organized in separate departments it is possible to keep separate loan records by department, to put material on interdepartmental loan from the parent department to the host department, to lend that material further to members in the host department, to return material in any department and search for material in the catalogue by departments. For the needs of loan systems, a note about the copy (item) can be added for individual copies (items) of material; for material on loan, temporary notes can be entered as well. In the local catalogue, you can perform searches for individual items of material, view bibliographic and holdings data and, if the item is not available, provide the information about who borrowed the material if it is not currently available. It is possible to use different criteria to search for data on library members, and then print out the search results as a list. Libraries that charge their members for specific services can also manage their price lists, record and settle debts, print invoices, cancel debt settlement, close out cash register and view cash register transactions. For members with delays in returning library material, libraries can create and print out overdue notices. Libraries can also change the contents of overdue notice forms, time parameters for loans, the opening days calendar, the settings for the electronic notification of library members; they can set the restricted number of material on loan, the restricted number of loan renewals and the membership validity period for individual member category, and change the URL address with contact details and notifications related to the My library service in COBISS/OPAC. It is now also possible for libraries to perform automated loan procedures in the mobile library and use the RFID self-checkout and RFID reader at the lending desk.

COBISS3/Interlibrary Loan is a module which includes the following procedures: recording customer requests for ILL, reservation of home library materials, ordering materials from suppliers or the library's closed stacks, recording the receipt of material to the customer, recording the receipt of materials from suppliers or the library's closed stacks, delivery of materials to the customer, return of materials from the customer and return of materials to the supplier or the library's closed stacks. It also includes preparation and submission of invoices for legal entities, i.e. partners who order or pay for the services provided, preparation of messages for customers and suppliers, partner data maintenance and price lists as well as counter set-up.

COBISS3/Reports is a module which allows you to create multiple types of reports, such as different forms, business documents, statistics, etc. Reports are created on the basis of data from all the COBISS3 software modules and can be printed out or sent by e-mail when they are ready. The standard-form reports for each module are designed at IZUM.

COBISS3/Application Administration is a module which allows libraries to maintain data on their home library and partners and to view data on system users.

The contents of the manual correspond to the currently valid version of COBISS3 software, and are also valid for all future software versions until they are withdrawn or another electronic version is published. The contents of the manual are saved on the **Training** portal and available by selecting *E-manuals,* you can also access the contents directly by going to the **Help** menu within the COBISS3 software.

For better understanding of software functioning, a glossary of the used expressions is included in the *COBISS3 Basic Guidelines* User Manual.

Further information and help is available at the seat of the National COBISS Centre in your country (contact details published on the last page of the manual).

1   INTRODUCTION

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

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

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

- data on members from member records

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

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

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

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

- data on entered debts

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

- data on entered overdue notices

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

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

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

- set up time parameters for loan

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

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

- if necessary, specify the price list

- if necessary, edit overdue notice forms

Most loan-related procedures (registering a new member, outside loan, reading room loan, return of material, etc.) are performed in the **Member** class. You can also find or return borrowed material (except for material borrowed through interlibrary loan) within the **Unavailable material** class. Some loan parameters, e.g. time parameters, are set up in the **Home library** class. Instructions for working with classes common with other software modules (e.g. **Partner**, **Material**, **Field 996/997**, **Home library**) are described in the respective user manuals. The **Material** class can give you insight in the status

of the material on loan including the information about who borrowed the material. It is also possible to enter a note on the individual item for the **Field 996/997** object. Price lists can be managed in the **Price list** class, while searching for invoices, entered members' debts and cash register transactions can be performed in the respective classes in the **Entering and settling debts** folder. Cash register can be closed in the **Cash register balance** class.

2 SETTING UP PARAMETERS

Within the COBISS3/Loan software module, you can set up the following parameters in the library:

- loan related time parameters for different types of material
- calendar with a list of non-work days in the library
- parameters for electronic notification of library members
- web page address where contact details and notifications related to the My Library service in COBISS/OPAC are published
- restriction for some member categories or some types of material (restrictions on operations)

To set up the loan parameters, use different methods within the **Home library** class. In libraries in which loan is organised in separate departments it is possible to set up different time parameters and a calendar for each department.

Note:

To set up the parameters, the following privilege: LOAN_EDT – Changing loan parameters *is required. If you do not have this privilege, you can see the parameter settings by using the* **Show loan parameters** *method in the* **Home library** *class or on the* **Department** *object. If a calendar or time parameters for individual departments are not set up, a notification will be displayed.*

Subchapters:

- Time parameters
- Calendar
- Loan type (pq table)
- Electronic notification
- Contact details and information for COBISS/OPAC
- Restrictions on operations

2.1.1   Loan period expiry date for textbook fund

In school libraries, where loan is organized by departments, a special loan period expiry date can be set in the department that is defined as the textbook fund. This date is taken into account when material is put on loan, regardless of the type of material and the date of loan procedures. The set loan period expiry date will be taken into account until it is either deleted or changed by the library. The loan period expiry date set in this way has priority over all time parameters values in the *borr.* column, which are entered in the **Time parameters table** window.

Procedure

1. In the **Department** class, find and select the department that is defined as a textbook fund, and then use the **Object / Loan period expiry date** method.

2. The **Loan period expiry date** window will open, where you can enter the date in the form *dd.mm.yyy.* into the entry field.

3. To confirm the entry, click the **OK** button.

Note:

- *Setting the loan period expiry date is linked to all usernames that are logged into the application after the setting is changed.*

- *The loan period expiry date must be greater than the current date.*

- *The loan period expiry date does not affect other loan transactions where values of other time parameters are taken into account (e.g. parameters in columns res. ren., etc.).*

2.4   ELECTRONIC NOTIFICATION

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

The **E-notification** window will open. Use it to select which method of notification will be offered to library members by ticking the checkbox next to the methods of notification.

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

2.4.1   Notification types

You can select e-mail, push notifications, or SMS notifications:

- Notification about reservation expiry

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

- Notification about received reserved material

  A member subscribed to this type of notification will receive a notification if the material that the member reserved has come to the library or if the available reserved material is ready for collection (status *W*). If the member is the first on the list of reservations, he/she will receive a notification when some other member returns the material at the borrowing desk. The member can receive the notification even if the reservation whose validity has expired is deleted, but if the member who was before him/her on the list of reservations cancelled the reservation (statuses *O* and *W*).

- Notification about loan expiry date

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

- Notification about a forthcoming overdue notice

  A member subscribed to this type of notification will receive a notification if the loan validity period has expired for any copy on loan and if a certain number of days is left before the overdue notice will be sent (e.g. 3 days). The member will receive as many notifications about a forthcoming overdue notice for each copy of material as the library sends them (1. overdue notice, 2. overdue notice, 3. overdue notice and 4. overdue notice), but not more than four. These notifications are sent out automatically once a day in a batch of notifications.

- Notification about membership expiry

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

- General notifications

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

Note:

To ensure that the member knows from which library the notification was sent when he/she receives an SMS, the library must define the Abbreviated library name or lib. dpt. name *local code list (CODE 316). At the beginning of the SMS body, library or department name is displayed if it is entered to the local code list. Library acronym represents the code in the local code list for libraries without departments (e.g. FFLJ), while the abbreviated library name represents the code resolution. In libraries with departments a two-digit department ID must be added to the acronym (e.g. SIKMB01). Abbreviated library name must not exceed 30 characters.*

Note:

You can change the text for e-mail notifications according to your needs. For that purpose copy the appropriate system variable to users' 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. Select the **Member** class and then the **Class / Send general notification** method.

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

    - type of notification

      If you wish to send a notification by SMS and/or push notification, tick the **SMS and push notification** check box; and if you wish to send the notification via e-mail, leave the check-box empty.

    - contents of notification

      By clicking the **Enter text** button a new window will open and you can use it to enter the notification text. If you wish to enter a SMS-notification, the text can have a maximum length of 155 characters.

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

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

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

    If you are sending a notification by SMS, it will be sent instantly.

> Note:
>
> *The sent notifications are stored in the **Notification** class, where you can find them, view them, and re-send them if necessary.*

3.1   REGISTERING A NEW MEMBER

The procedure of registering a new library member, which is described below, consists of the following steps:

- defining a membership card number

- entering data on the member (member attributes), which is divided to the following tabs: **General**, **Schooling**, **employment**, **Membership** and **Info**

  A library can set up a parameter for transferring member details from the reference students database.

- assigning a password (if necessary) to access the online services of COBISS/OPAC

- printing the label for the membership card

- entering debt for membership fee or admission fee (if applied), i.e. entering membership validity (if controlled)

Libraries with departments usually keep records on members separately by departments. The first two digits of the membership card number represent the department, but the members are actually entered to the shared database of members and they can borrow material in all library departments with the same membership card.

Example:

If the membership card number is *0100203*, the member is registered to department 01 under current number 203.

Tip:

At the request of a library with departments, it is possible to set up a special parameter which excludes department ID from the membership card number.

3.1.1   Defining a membership card number

Procedure

1. Select the **Member** class. Next, select the **Class / New object** method.

2. The **Membership card number** window will open where you will define the member's identification number. For information purposes, the highest assigned membership card number will be displayed in the window. By selecting the number assignment method you can specify whether you wish to enter the number manually or define it automatically.

3. To confirm the entry, click the **OK** button.

Depending on the most frequent type of defining a membership card number in a library, the corresponding type of defining a membership card number (e.g. **Search up**) will already be selected (default value).

If a library sets up a special parameter for transferring member details from the reference students database, the **Membership card number** window will be updated (see chapter *3.1.2.5*).

3.1.1.1   Entering membership card number manually

Select the **Manual entry** radio button and type in or enter the desired number by using the reader under "Membership card number".

Use this option if the membership card has been previously prepared for the member (with bar code label) or if you wish to keep the member's previously allocated membership card number from your "old" records.

3.1.1.2   Entering membership card number automatically

Select the **Search up** or **Search down** radio button, and, if necessary, change the search parameter under "Search from". The current value under "Search from" is by one larger than the last automatically allocated number. Manually assigned numbers do not affect the automatic assignment of numbers. The software will search for the first available number either up or down from the set limit.

Tip:

If you do not save the data on the library member under the selected number, that number will not be taken into account next time you define a membership card number. The initialisation of the counter is automatic.

You can see available numbers by selecting the **Member** class and then the **Show available numbers** method.

Note:

*If a counter error occurs under "Search from", you can reset the counter by finding and selecting the counter in the **Counters** class, and then use the **Object / Edit** method. To use this method, the privilege* LOAN_OPER – Setting lowest counter value *is required (see chapter 5).*

3.1.2   Entering data on the member

Once the membership card number is defined, the **Member** editor will open. Use it to enter and edit data on the library member. The data on the member is divided into four tabs:

- **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 control of 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 and the data on the member(s) with identical details.

   On library's special request, it is possible to make this data non-mandatory with 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 "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.

   At 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* with a special parameter.

5. 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.

6. 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 select for them will be checked against 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*

7. 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*).

8. 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 date of entry, username of the librarian who entered the note and, in libraries with departments, the department in which the librarian was logged.

9. By clicking the **Privileges** button, a new window will open where you can highlight the member's privileges.

   Member's privileges can be the following:

   • Access to OCLC database

     If this privilege is granted to the member, he/she can access OCLC database via COBISS/OPAC. The privilege can be granted only by the authorised person in the library which 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 membership expires. Since charging membership fee is related to member category, it is convenient to grant the privilege only to individual members of those categories for which you otherwise charge the membership fee.

   • No loan fee

     If the member has this privilege, loan fee that is otherwise charged to other members for that type of material will not be charged when borrowing or renewing loan period.

   • No overdue notices

     If the privilege is granted, the member will not receive overdue notice for exceeded loan period, costs for overdue notices are not charged as well.

   • No fine

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

- No reservation fee

  If the member has this privilege, 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.*

10. 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 the member:

    - Entry denied

      If this restriction applies to the member, no other procedure except returning of 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 as well.

    - Internet access only

      If the restriction applies to the member, no other procedure except returning of 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 the material via COBISS/OPAC due to this restriction as well.

    - 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 as well.

    - 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 of 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 as well.

- Membership card lost

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

- Membership card found

You will set up this restriction if the membership card the member lost or forgot somewhere has been found. If the restriction *membership card lost* was set up before that, you will cancel it. It is convenient to enter the location where the membership card is to the note about 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, the restriction can be cancelled.

- 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 libraries which signed the statement on accessing foreign services and which enabled remote access.

- 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.

11. Under "No. of copies on loan restr. (LOAN)" enter the maximum number
    of copies that the member can have on loan.

12. Under "Renewal limit (LOAN)" enter the number of renewals allowed to
    the member after the loan period expires

13. 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.

14. 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.

15. 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.

16. Under "Date of last visit" the date of the last visit is displayed regardless of
    whether the visit was recorded in library or outside library (e.g. in
    COBISS/OPAC) and regardless of department in which it was recorded.

3.1.2.1.1   Entering addresses

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

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 the address and settings for electronic notification in the special window which opens after you click the **E-notification** button. You can enter the e-mail address and the mobile phone number and define which types of notifications the library member will receive by e-mail or SMS. The settings for individual notification types depend in the first place on types of notifications your library enables (see chapter 2.4).

Note:
Usually, the addresses and settings for e-notifications 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 the library member should be warned that he/she will receive SMS notifications only if he/she uses services of mobile provider which enables sending of commercial SMS messages and if sending of such messages is not cancelled.

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 with which the library members can identify themselves when visiting the library. When entering alternative numbers, duplication of numbers will be automatically checked; 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 and select the invalid number in the window, and click the **Show** button.

Tip:

The membership card number of a deleted member or 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 which will open once you click the **Password** button. A series of asterisks will appear while entering the password. If the member forgets the password, a new one must be defined.

3.1.2.2   Entering data on schooling and employment

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

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

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

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

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

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

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

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

5. Under "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.*

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

3.1.2.2.1   Entering data on schooling in the eVŠ system

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

By clicking the button, a window will open where you can specify data on the university, study programme, study programme B and mode of study by selecting appropriate values from the drop-down lists. The drop-down lists for a study programme 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 at 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 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 "Statement signed", tick the check-box to indicate whether the member signed the membership statement or not.

3.1.2.4 Data on member conduct

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

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

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

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

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

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

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

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

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

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

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

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

3.1.2.5 Transferring member details from the reference students database

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

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

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

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

3.1.3   Defining a superior member

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

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

3.1.3.1   Family card

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

| *Procedure* | 1. Once you click the **Superior member** button, the **Search – Member** window will open. |
| | 2. Find and select the member you wish to define as superior member. |

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

3.   Save the member details.

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

3.1.3.2   Legal entity card

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

Procedure

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

2.   Find and select the partner.

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

3.   Save the member details.

3.3   DELETING MEMBER DETAILS

Member details can be deleted from the database if required. You can decide whether to make the membership card number available again or keep it unavailable (in which case you will not be able allocate the number to any other library member).

> Note:
>
> *To delete member details, the privilege* LOAN_DELETE – Deletion of members *is required.*

Procedure

1. In the **Member** class, find and select one or more member(s) by using one of the methods available (see chapter *3.6*).

2. For the selected member(s), use the **Object / Delete member details** method.

    The **Deletion of member details** window will open. Use it to specify:

    -   if the membership card number of the deleted library member should remain unavailable

        If you wish for the membership card number to remain unavailable, leave the tick in the **Membership card No. remains unavailable** check-box. This means that the membership card number cannot be allocated to a new library member.

> Tip:
>
> The membership card number of the deleted member that was saved under invalid numbers can become available if you find the invalid number and delete it by using the **Delete invalid number** object method.

    -   the reason for deleting the member's details

        From the drop-down list, select the reason for deleting the member's details (e.g. *4 member completed schooling*).

3. To confirm the deletion of member details, click the **OK** button.

> Note:
>
> *Member details cannot be deleted if:*
>
> *– the member still has items on loan,*
>
> *– the member has debts,*
>
> *– the member is a superior member in the category 019 –* family card,
>
> *– a note is entered for the member*
>
> *– if a pending ILL request or material on pending ILL requests are entered for the member.*

> Tip:
>
> The list indicating the reasons for deleting member data can be prepared in the COBISS3/Reports software module, if you select the report type **LOAN_Mb_04: Deleted members** within the **Members** group.

3.8   BATCH DELETION OF DATA ON INACTIVE MEMBERS

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

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

- batch deletion of data on *all* inactive members

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

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

3.8.1   Batch deletion of data on all inactive members

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

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

- the information commissioner's interpretation

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

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

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

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

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

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

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

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

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

   - material (on loan, reserved, etc.)

   - debt

   - note

   - pending ILL request or material from pending ILL requests

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

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

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

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

     – membership validity period for all membership categories or an individual membership category that was defined by the library using the **Home library / Restrictions on operations** method
     – default period of one year, if the **Membership validity** table is empty.

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

   When deleting data on (inactive) members, the members who are not natural persons will be exempt from deletion (category *124 – institution's organizational units*, *125 – legal entities – ext. institutions* and *126 – interdepartmental loan units*).

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

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

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

- Sorting of data on report

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

- Execution time

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

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

3. Click the **OK** button.

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

- number of all members
- number of members, whose membership expired a year ago, or sooner
- number of members, where the »Membership expiry date« attribute is empty
- number of members, where a year or more has passed since their last visit
- number of inactive members, who will not be deleted as they are not, according to the category data, natural persons
- number of inactive members who will not be deleted as material is recorded for these members
- number of inactive members who will not be deleted because pending ILL requests or material from pending ILL requests are entered for the members

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

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

- number of inactive members who will be deleted

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

   Two control lists will be prepared:

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

   - a list of members who will be deleted

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

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

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

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

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

3.8.2   Batch deletion of data on selected inactive members

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

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

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

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

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

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

Precondition

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

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

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

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

   - material (on loan, reserved, etc.)

   - debt

   - note

   - pending ILL request or material from pending ILL requests

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

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

Note:

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

Procedure

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

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

- Number of years from the last visit

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

- Sorting of data on report

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

- Execution time

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

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

3. Click the **OK** button.

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

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

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

- number of selected members

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

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

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

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

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

- number of inactive members who will be deleted

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

Two control lists will be prepared:

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

*   list of members who will be deleted

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

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

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

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

Tip:

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

3.9   REFERENCE STUDENTS DATABASE

Data on students, which are collected and prepared by the university computer centres, is the basis for creating the reference students database (hereinafter referred to as ref. students database).

Ref. students database can be prepared in two following ways:

- the data in the existing database is deleted before creating a new ref. students database – in this way the database will contain only new data on students

- the data in the existing database is not deleted before creating a new ref. students database – in this way the new data on students (e.g. first-year students) will be added to the existing data

Ref. students database forms the basis for registering new members in a library. If a member who you wish to enter to the members database is a university student, you can, based on his/her surname, name, user number (10-digit number) or membership card number (17-digit number), download his/her data from the ref. students database to the members database (see chapter *3.1.2.5*).

Ref. students database is the basis for updating data on students who are already entered in the members database. For the library member, whose user number (10-digit number) can be found also in the ref. students database, the data in the member's records is overwritten with the new data from the ref. database.

One ref. students database can be used by one or more libraries (e.g. libraries from different faculties of one university). When several libraries use it, the reference database is installed to the local database of the library that maintains the database. Other libraries only use the data from the ref. database when entering new members and when updating details about members – students. Settings for the library that maintains the ref. students database and for libraries that use the database are set by special parameters in the configuration file.

> Note:
>
> *To perform procedures related to the ref. students database the privilege* LOAN_STUD – Maintenance of reference students database *is required*.

3.9.1   Structure of the file with data on students

The Excel file with data on students must contain the following columns:

- user number (10-digit number)
- student transcript number (8-digit student transcript number; mandatory until the old card with this number is in use)

- membership card number (17-digit membership card number of a student, which is entered on a RFID chip)
- university (7-digit code of the university in eVŠ)
- study programme (7-digit code of the study programme in eVŠ)
- mode of study (2-digit code of the mode of study)
- year of study (2-digit code of the year of study)
- study programme B (7-digit code of the study programme in eVŠ)
- surname
- name
- date of birth (in the form YYYYMMDD)
- permanent address
- permanent address postcode
- temporary address
- temporary address postcode
- citizenship (3-digit code of the country)
  This data does not exist under member details in COBISS3.
- e-mail address

3.9.1.1 Converting Excel file with data on students into text file

Ref. students database is created from the text file in which data must be separated with a vertical bar. For this reason, the Excel file must be converted to a text file.

Procedure

1. Open the Excel file with data on students.

2. Select **File / Save as**.

   The **Save as** window will open.

   Find a folder into which you wish to save the text file.

   Define the file name.

   Under "Save as type", select *Text (Tab delimited) (*.txt)*.

   Click the **Save** button.

3. In the window with notification about saving the active tab, click the **OK** button.

4. In the window with a notification about the selected type of file *Text (Tab delimited)*, click the **Yes** button.

   The text file will be saved.

5. Find and open the text file.

Tip:

It is recommended to use Notepad and UltraEdit to edit the text file.

---

6. Delete the title bar from the text file.

7. Replace the tab character with the vertical bar (character "|") and save the file.

Tip:

You can replace the characters by using the **Replace** function. Under "Find What", enter the tab character by highlighting the blank space between two sets of data in the text file, copy it by pressing <Ctrl> + <C> and paste it by pressing <Ctrl> + <V>. Under "Replace With", enter the character "|" by pressing <Alt Gr> + <W>.

8. In the text file, check and delete blank lines at the end of the file if necessary.

9. Save the file.

3.9.2   Preparing the database

The **Reference students database** class is in the **Reference databases** folder.

When the ref. students database is used by several libraries, the class is available in the database of the library that maintains it.

Ref. students database can be prepared in the following two ways:

- the data in the existing database is deleted before creating a new ref. students database – this way the database will contain only new data on students

- the data in the existing database is not deleted before creating a new ref. students database – this way new data on students (e.g. first-year students) will be added to the existing data

Procedure

1. Highlight the **Reference students database** class and select the **Class / Prepare reference database** method.

   A window will open, where you:

   - enter the membership expiry date
   - enter the note
   - mark if you wish for the temporary address from the text file to be entered into the reference students database as a business address

Example:

The note is intended for entering a designation (e.g. UM is the agreed designation for the University of Maribor libraries.)

2. Click the **OK** button.

   The **Select file** window will open.

3. Find and select the text file with data on students and click the **Open** button.

    After you finish preparing the ref. students database, a window with the date and time of starting the procedure, date and time of ending the procedure and the number of students entered into the ref. students database will open.

3.9.3   Deleting the database

Before you start preparing a new ref. students database, delete the data in the existing ref. database.

Procedure

1. Highlight the **Reference students database** class and select the **Class / Delete the reference database content** method.

    After you delete it, there are no more student records in the ref. database.

3.9.4   Updating data on entered members – students with data from the reference students database

When the ref. students database is prepared, you can update data on entered members – students.

> Note:
>
> *Before you start the update, make sure you check if the data in the ref. database is correct. If the data is incorrect, delete the database and prepare it again.*

The key data for updating is the 10-digit user number.

During the update, the member details are overwritten with new data from the ref. students database. The following member details are updated: university in eVŠ, study programme in eVŠ, mode of study, study programme in eVŠ – B, year of study, data on permanent and temporary address, and membership expiry date. On the basis of the mode of study, the member category is automatically defined.

A library can decide that members – students that are not in the ref. students database are highlighted after the update. For the relevant members the designation X is added in front of the user number, student number and card number.

Note:

When performing the update, you cannot run other procedures at the same time; for this reason, the update must be performed outside the library's working hours or it can be set up at a later time. You can set up the update procedure at a later time by entering the date and time under "Execution time".

Procedure

2. Highlight the **Member** class and select the **Class / Update data on members – students** method.

   A window will open, where a number of members – students, who have a username entered and will thus be updated, will be displayed.

   Mark in the window, whether you wish to perform the *final update* in the members database. The final update means that you highlight the members – students who are no longer in the ref. database. For the relevant members, X is added in front of the user number, student number and card number.

   Under "Execution time (dd.mm.YYYY hh:mm:ss)" set the date and time of starting the update. If you do not set the execution time, the update will start immediately.

3. Click the **OK** button.

   After the update completes, a window will open with data on the date and time of starting the procedure, date and time of ending the procedure and a number of members who were checked automatically during the update and updated in accordance with the data in the ref. database.

   The update statistics is displayed in the report LOAN-Mb-07: Statistics of updating member details – students.

Options

You can perform the update for an individual member. Find and select the member and start the update procedure by using the **Object / Update member details – student** method.

4 HOME LIBRARY MATERIAL

All procedures of entering the material (loan, loan renewal, returns) for a selected member are performed in the **Home library material** window. You can access the local catalogue from the **Home library material** window where you can put the material on loan or reserve it for a member.

Subchapters:

- Selecting a member
- Home library material editor
- Outside loan
- Interdepartamental loan
- Reading room loan
- Returning material
- Loan renewal
- Changing the due date
- Entering notes on material
- Printing lending forms
- Displaying a record in the COMARC format
- Viewing the library material status
- Catalogue
- Reserving material
- Routing lists for serials
- Entering the loss of material
- Keeping records on the loan of sets
- Loan in mobile library

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 the member has the restrictions *Membership card retained*, *Membership card lost* or *Membership card found*, a notification will appear.

- If the member has the restriction *Outside loan not allowed*, the **Outside loan** button in the **Home library material** editor will be inactive, the **Lend** and **Renew** buttons are inactive in case of the restriction *Membership card retained*, while the **Renew** button is inactive in case of the restriction *Renewal denied*.

- 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 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:

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

- total of outstanding debts (in libraries which use cash register)

- limitation of number of copies (items) on loan

- restriction on loan renewal

- restrictions

- privileges

- note

- number of items currently on loan (outside loan , reading room loan or interlibrary loan) to member

Note:

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

- membership expiry date (if the membership has expired, the date is displayed in red)

- date of last visit (if more than one year passed from the last visit, the date is displayed in red)

- note indicators

  – *LST – lost material is recorded for the member*

  – *OVR – the member has an overdue notice recorded for the material on loan*

  – *OLD – the member has already received an overdue notice*

  – *SPM – a special membership is recorded for the library member*

Tip:

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

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

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

Tip:

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

Tip:

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

Tip:

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

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

1st column

- the item status, which can be one of the following:

  - *C(irculate) – the item is on outside loan*

  - *S(tudy room) – the item is on loan in the reading room*

  - *M – the item is borrowed through interlibrary loan*

- *R(eserve) – material is reserved*

- *W(aiting) – the item was returned to the library and is on hold for the library member who reserved it*

- *L(ost) – the item is recorded as lost*

- *O(rder) – the item is reserved and available*

- *B(ack) – the item is returned, but is still recorded for the library member because of possible claims*

- *D – the item is on loan to another department*

- *K – the item is on loan for routing*

- *U – the item is reserved for reading room use*

- note on item

- temporary note

2nd column

- material ID

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

- type of material

- the type of material that was taken into account when put on loan or reserved, if it is different from the type of material in terms of physical form (in the case of multi-type material that is put on loan as a set)

3rd column

- description of material

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

4th column

- item's parent department

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

5th column

- date of loan of the item (in case of outside loan, reading room loan and interdepartmental loan)

- dates of renewal (date of last renewal first)

- date of last change of the return date

6th column

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

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

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

7th column

- loan expiry date, reservation validity expiry date

- date of last overdue notice receipt

Note:

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

8th column

- number of days of delay

Tip:

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

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

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

– restricted number of days of delay for which the fine will be calculated (daily fine increases until a certain number of days has been reached)

– the fine is not calculated during the fine grace period defined in the table of time parameters

– the fine is not calculated for the period when the price was not determined in the valid price list

- number of last received overdue notice

- current number of an item in the list of recorded material

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

- **Catalogue** – accessing the local catalogue of material, where you can search for, view and select material for loan from the local database in order to put it on loan or reserve it

- **View** – insight into the library material status; for material on loan you can get the information if the material is reserved by other members and for material which is reserved by the member you can get the information who borrowed the material, when you can expect the material to be returned and at which place of the list of reservations the member is

- **COMARC** – displaying a bibliographic record with all fields 996/997 in the COMARC format; individual data can be copied and pasted to the desired place in the editor

- **Lend** – lending the item for outside loan or interdepartmental loan, if the **Outside loan** radio button is selected; or reading room loan if the **Reading room loan** radio button is selected; enter the item's identification number (accession number or loan number) to "AN/LN="

Tip:

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

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

- **Retain** – returning with restriction; before clicking the button, enter the item identification number (accession number or loan number) under "AN/LN=" or highlight the item on the list

- **Renew** – renewing the loan period; before clicking the button highlight the item on the list

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Tip:

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

Note:

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

- **Lending form** – printing the list of recorded material by using the printer

Tip:

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

Tip:

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

<Alt> + <I> = Lend

<Alt> + <V> = Return

<Alt> + <A> = Retain

<Alt> + <P> = Renew

<Alt> + <K> = Catalogue

<Alt> + <G> = View

<Alt> + <C> = COMARC

<Alt> + <D> = Lending form

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

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

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

Tip:

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

4.3   OUTSIDE LOAN

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

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

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

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

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

Note:

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

Note:

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

Note:

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

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

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

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

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

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

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

Note:

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

– the item's identification number does not exist

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

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

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

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

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

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

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

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

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

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

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

Tip:

Upon the library's request, the material that is currently on loan to another member can be put on loan by setting up a special parameter. If you want to lend such material, a note will appear indicating that the item is on loan, and you can decide whether the material will be entered as returned under the first member at the same time as it is entered as put on loan to a new member. This is common practice in school libraries.

4.3.1   Lending by entering the item's ID number

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

Procedure

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

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

3. Confirm the entry by clicking the Lend button.

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

4.3.1.1   Lending serials

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

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

> Example:
>
> If you wish to lend issue number 10:
>
> AN/LN= *220030010,10*
>
> If you wish to lend issues 1 to 5, which are bound together:
>
> AN/LN= *220030010,1-5*

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

4.3.2   Loan with selection from catalogue

If the member hasn't found the material he/she wishes to borrow, you can help by finding and selecting the material from the catalogue.

Procedure

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

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

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

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

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

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

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

4.3.3   Interdepartamental loan

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

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

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

Precondition

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

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

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

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

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

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

Procedure

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

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

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

   - by entering the two digit department ID

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

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

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

Tip:

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

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

- by entering the ID of the item in "AN/LN="

- by searching and selecting in the catalogue

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

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calendar of the parent department is also taken into account.

Note:

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

4.4   READING ROOM LOAN

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

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

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

Tip:

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

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

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

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

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

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

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

Note:

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

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

– availability level (996/997p) is defined for the copy restricting reading room loan; it usually applies to availability level 5 – restricted availability – with author's permission *or* 6 – the contents of the document is not available

– status (996/997q) is defined for the copy restricting reading room loan; it normally applies to status 6 – damaged

– the copy is reserved for other member (it is a reservation of available material (status O) or the material waits for the member(status W))

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

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Note:

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

– the item's identification number does not exist

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

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

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

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

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

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

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

4.5   RETURNING MATERIAL

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

Note:

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

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

- without selecting the member, by entering the item's identification number

- in the **Home library material** window, by entering the item's identification number (accession number or loan number)

- in the **Home library material** window by selecting the item(s) from the list; only in that way you can delete the reservations of currently unavailable material (material status *R*) where reservation ID number is COBISS.SI-ID

Tip:

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

The procedure of returning the material put on interdepartamental loan from the host department to the parent department is done in the same way as returning the material borrowed by the member.

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

When returning the material which is reserved, the details on the reservation that is on the top of the list of reservations will be displayed. If **reservation for member** (who has reserved the material in loan) is at the top of the list, the member's membership card number, together with his/her name and surname,

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

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

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

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

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

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

When returning the material on interdepartmental loan which is reserved in the host department, a note that the material belongs to another department will be displayed. You can decide if you still wish to allocate the material to the member who reserved it. 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 (despite 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 *0d* 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.

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 <Enter> key.

4. To close the **Home library material** window, click the **Close** button or press the <Esc> key.

   You will return to the **Search by key** window, where you can enter the identification number of the next item that needs to be returned. To exit the window, click the **Cancel** button.

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 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.).

4.6   LOAN RENEWAL

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

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

Procedure

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

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

2. Select the member.

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

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

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

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

4. Click the **Renew** button.

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

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

Note:

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

– the member reached the loan renewal limit for the item

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

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

Note:

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

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

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

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

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

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

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

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

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

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

– the material is reserved for other member

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

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

Note:

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

Note:

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

4.7   CHANGING THE DUE DATE

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

Procedure

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

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

2. Select the member.

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

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

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

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

Tip:

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

Tip:

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

Note:

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

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

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

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

> Note:
>
> *The new due date you enter must be more recent than the current date.*

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

– availability level (996/997p) is defined for the copy restricting the loan; it usually applies to availability level 4 – restricted availability – reading room, 5 – restricted availability – with author's permission *or* 6 – the contents of the document is not available

– status (996/997q) is defined for the copy restricting the loan; it usually applies to status 6 – damaged

Note:

The material cannot be reserved in the following cases:

– there is no field 996/997 with accession number for the material

– the material does not belong to the department or is not put on interdepartmental loan to the department in which you wish to put it on loan (applies to libraries in which loan is organised by departments)

– the library does not allow loan for that type of material (reservation validity period is not defined in the time parameter table)

– availability restriction is defined for the copy 0d *(996/997u) restricting outside loan, reading room loan and reservation of the material*

– the material is already on loan to the member

– the material is already reserved by the member

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

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

– the **Reserve** *button is inactive as one of the restrictions which disable the reservation applies for the member (Entry denied, Internet access only, membership card retained)*

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

4.13.1   Reservations of available material

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

The reserved copy is displayed at the end of the list of the material recorded for the member and has status *O*. Reservation validity expiry date is automatically

calculated based on reservation validity period of the available copy which you defined for that type of material in time parameters table in the column *ord.* (see. ch. *2.1*). During this period you usually do not lend this copy to other members. The period to which the reservation of available material applies is usually shorter than the period that applies to usual reservations.

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

> Note:
>
> *If you wish to be notified regularly about reservations of available material recorded by the members in COBISS/OPAC, you must enter e-mail address for receiving notifications on reservations (see chapter* 2.5*). In libraries with departments enter e-mail address to the data on department.*

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

4.13.1.1 Preparing reserved material for collection

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

Precondition   The copy of the material has status *O*.

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

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

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

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

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

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

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

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

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

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

4.13.1.2 Printing slip with reservation details

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

- when returning the reserved material to the library if you allocate the copy to the member

- when preparing the reserved available material for collection (see

chapter *4.13.1.1*)

Note:

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

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

4.13.2   Reservations of unavailable material

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

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

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

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

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

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

- return of the material

- deleting the reservation of available material (status *O* or *W*)

- cancellation of the reservation in the My library service

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

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

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

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

4.13.2.1 Editing a list of reservations

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

- when the reserved material is returned to the library and is allocated to the member or for interlibrary loan (status of the material is changed from *R – reserved unavailable materials* to *W – waiting on the shelf (reserved)*, other members on the list move up for one place

- when the material is lent to someone else and not to the member with the reservation of available material (status of the material was *W – waiting on the shelf (reserved)* or *O – reserved available material*) the member with the reservation is placed on the first place of the list of reservations

- when the reservations are deleted or cancelled, other members on the list of reservations are moved up for one place on the list of reservations

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

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

- privilege *LOAN_RES – editing list of reservations*

- you came to the **Insight into library material status** window from the

Home library material window for the member for whom you wish to change place of reservation

Procedure

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

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

2. In "New place" enter the place on which you wish to place the member on the list of reservations.

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

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

4.13.3   Processing reservations

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

You can prepare:

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

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

*   list of reservations cancelled via COBISS/OPAC

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

*   daily list of new reservations

*   daily list of cancelled reservations

- lending forms for new reservations

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

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

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

2. Select the list that you wish to prepare by ticking the appropriate radio button:

   - new reservations and cancellations in COBISS/OPAC which contains all new reservations (in the COBISS3/Loan module and via COBISS/OPAC) and cancellations via COBISS/OPAC since the last creation of the list; two lists are created

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

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

   - new reservations of unavailable material (material with status *R*)

   - lending forms for reserved available material

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

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

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

Note:

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

If the material was allocated to the next member or partner on the list of reservations after the reservation was cancelled, details of that member or partner will be displayed. In this case, the copy is not returned on the shelf or to the closed stacks. The member to whom the material was allocated must be notified that the material waits in the library. If the library enables notification

about available reserved material by e-mail or SMS notification and if that service is activated for the member, the member will receive an automatic notification.

Note:

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

4.13.4   Batch deletion of reservations whose validity period expired

When recording reservations the date until which the reservation is valid is determined on the basis of the reservation validity period for individual type of material entered to the time parameter table (see ch. *2.1*). If the member does not collect the material until that date, the reservation is considered to be invalid. The reservations can be deleted several times a day. If the loan is organised separately by departments, reservations must be deleted separately in every department.

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

Procedure

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

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

2. Select the reservations that you wish to delete:

   - W – waiting on the shelf (reserved)

   - O – reserved available copy

   - R – reserved unavailable copy

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

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

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

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

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

> Note:
>
> *Interlibrary loan reservations will not be deleted when batch deleting reservations.*

> Tip:
>
> When searching for the material on the shelf on the basis of the list of new reservations of available material, use the **Prepare reserved material for collection** method in the **Unavailable material** class (see chapter 4.13.1.1). By doing so you change the loan status from *O* to *W*.

4.13.5   Reserving material for reading room use

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

Precondition   General conditions for a reading room reservation are as follows:

- reservation can be recorded only for the member you previously selected

- reservation for department is not possible

- reservation of material is not possible if a copy is not accessible for loan

- reservation of material is not possible if a copy is not available for loan

- in libraries with departments, it is possible to record a reservation of a copy only in the department to which a copy belongs to or is on

interdepartmental loan to that department

Procedure

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

   The **Catalogue** window will open.

2. Find the material (the procedure of searching the catalogue is described in chapter *4.12.1*).

3. Select the copy of the material for reading room reservation.

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

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

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

After a successful reservation, the **Catalogue** window will close and the **Home library material** window will stay open. The reserved material will be added at the end of the list of recorded material under the member with status *U – reserved in reading room*. The reading room reservation expiry date will be automatically calculated based on the reading room reservation validity period that is defined for this type of material in the column *read.* in the time parameters table.

Note:

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

– the member has already reached the maximum allowed number of reservations

– availability level (996/997p) is defined for the copy restricting the loan; it usually applies to availability level 5 – restricted availability – with author's permission *or* 6 – the contents of the document is not available

– status (996/997q) is defined for the copy restricting the loan; it usually applies to status 6 – damaged

Note:

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

– there is no field 996/997 with accession number for the material

– the material does not belong to the department or is not put on interdepartmental loan to the department in which you wish to put it on loan (applies to libraries in which loan is organised by departments)

– *the library does not allow loan for that type of material (reservation validity period is not defined in the time parameter table)*

– *availability restriction is defined for the copy* 0d *(996/997u) restricting outside loan, reading room loan and reservation of the material*

– *the material is already on loan to the member*

– *the material is already reserved by the member*

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

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

– *the **Reserve** button is inactive as one of the restrictions which disable the reservation applies for the member (Entry denied, Internet access only, Membership card retained)*

4.15   ENTERING LOSS OF MATERIAL

Use the procedure when you wish to enter the loss of the material that you still wish to keep in the member's records until the payment method for the lost material is agreed upon with the member.

Precondition   Only copies that were on outside loan or reading room loan can be entered as lost (status *C* or *S*).

Note:

For material that is put on loan as a set, enter the loss of individual set items or of the complete set in the way that is described in chapter 4.16.

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

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

2. Select the member.

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

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

3. Find the copy in the list of entered material and double-click the status *C* or *S* (1st column).

The **Status selection** window will open.

4. In the window, select the status *LOST* and click **OK**.

The status of the entered material will change from *C* or *S* to *L – lost*. When calculating the status *L* expiration date, the time parameter *res.* (status *R*) will be taken into account.

The date of entering the loss is entered under "Date of loss", which will be displayed in the 1st row of the 6th column.

When entering the lost item, the number of lost items will be automatically increased under the data on the member conduct under "Lost material (LOAN)", and in the **Home library material** window, the note indicator *LST* will be displayed in the upper right corner of the screen.

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

If the material is reserved for another member, the material will **not** be allocated to this member when entering the loss.

On the lending form, the material that was entered as lost will be displayed in a special table.

A member can receive an overdue notice for the entered lost item when the status *L* validity date expires.

If a member after a certain period of time finds the item and returns it to the library, debts can be cleared for the member by putting the item on loan first and returning it after that.

Procedure

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

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

2. Select the member.

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

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

3. Find the copy on the list of entered material and double-click the status *C* or *S* (1st column).

    The **Status selection** window will open.

4. In the window, select the status *LOST* and click **OK**.

    The status of the entered material will change from *L – lost* to *C – outside loan*.

5. Return the item by clicking the **Return** button.

    The number of lost items under the member details will be decreased by one item.

If a member does not find and return the lost material after some time, the lost item will be deleted from the member's records.

Procedure

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

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

2. Select the member.

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

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

3. Highlight the lost item (status *L*) and click **Return**.

    The **Lost material** window will be displayed.

4. If you wish to highlight the item as lost and disable the loan, select the item and click **OK**.

    To the holdings data under "Status" (subfield 996q), value *8 – lost* is entered, and under "Loan restriction" (subfield 996u), *0d* is entered.

Note:

If you click **Cancel** *in the* **Lost material** *window, you must manually mark that this is a lost item in the holdings data; if not, the status* Available *will be displayed for this item, which is incorrect.*

If the material is reserved, when deleting the lost item from the member's records, it will be automatically checked whether there are any items without restriction available for loan.

- If an item without restriction *exists* and is **on loan**, the reservation entered for the member will not be deleted.

- If a copy without restrictions *exists* and is **available**, the reservation (status *R*) will be automatically deleted, and the reservation for the available material (status *O*) will be entered.

  A notification with data on the member who has reserved the material and a notification about changing the reservation will be displayed.

- If an item without restrictions *does not exist*, the reservation will be automatically deleted.

  If there are several members on the list of reservations for this material, the reservation will be deleted for all members and a note about this will be displayed at the same time.

Options   Debts for the lost material are entered manually for the member.

The number of lost copies for the member will not change; for this reason, the note indicator *LST* will still be displayed in the **Home library material** window. If you wish that the indicator is not displayed for the member, delete the number of lost copies under "Lost material (LOAN)" in the **Member** editor.

4.16   KEEPING RECORDS ON LOAN OF SETS

Libraries can make up a set if they wish that all set items are put on loan, returned, renewed or reserved at the same time and under the same conditions. The so called **leading item**, which defines common set properties, must be defined for the set:

- type of material is defined by the bibliographic record for the leading item or a physical form of the leading item, entered in element \o of subfield 996g

- when you lend a set, loan conditions of the leading item (time parameters, 996p, 996q, 996u and settings in table pq) are taken into account

- when entering debts, the debt for the complete set is charged only once under the conditions that apply to the leading item of the set

- overdue notice costs are charged only for the leading item; overdue notice is entered for each individual set item

- all set items are displayed on lending forms in a way that shows which set items are part of an individual set

When you **lend a set**, all set items must be put on loan together. When you read the accession number or the loan number of any item of the set, a window will open with a list of all items and then each item can be read separately. The same due date will be entered for all set items, and the loan period of the leading item of the set will be taken into account. If a loan fee or tear and wear fee is defined in the price list for this type of the leading item, enter it only once for the complete set and under the conditions that apply to the leading item.

When you **return a set**, as a rule, all set items must be returned at the same time. When you read one of the set items, a list of all items will open and you have to read each item separately. After you confirm it, all set items are deleted from the records. If you charge a fine when returning a set, you charge it only once under the conditions that apply to the leading item. It is also possible to return an incomplete set if a member lost an item or forgot it at home or returned a damaged or incomplete set. Use the procedure when you wish to enter the loss of material and keep it in the member's records at the same time until the payment method is agreed with the member.

When you **renew the loan** and you set a new return date, loan renewal period for the leading item is taken into account so that the same due date is entered for all set items. If the loan renewal for the leading item of the set is restricted, no item of the set can be renewed.

When you **reserve a set**, reservation validity period for the leading item is taken into account. Reservations of unavailable material are entered with an accession number of the leading item in the following form: <*COBISS.XX-ID, accession number of the leading item*>. You can enter the reservation of available set for the member by entering all set items with status *O*. You can

also reserve a set through the catalogue. You can select any set item in the hit list and by doing that reserve the complete set. When you delete the reservation, reservation for all set items is also deleted.

In **statistics**, transactions of individual set items are taken into account (if, for example, a set with five items is put on loan, the loan statistics will show the loan of five items).

4.16.1   Loan of a set

A set can be put on loan only in the **Home library material** window. It cannot be put on loan through the catalogue.

Procedure

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

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

2. Select the member.

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

   The **Home library material** window will open. The active **Lend** method is set as default and the **Outside loan** button is selected. If you wish to put a set on reading room loan, select the **Reading room** button.

3. Under "AN/LN=", enter or use a reader to enter the identification number of any set item.

   The **Set** window with a list of all items of the set will open. On the list, the accession number of the read item is displayed in green.

4. Read the other set items.

   When you confirm the last read item of the set, all set items will be entered with the status *C* or *S* and with the same loan period expiry date. The due date will be calculated according to the loan period of the leading item of the set.

> Note:
>
> *When controlling the number of items on loan, the set is considered as one item, irrespective of the number of items in the set.*

On the lending form, the set items are displayed so that the leading item is displayed first, followed by other items displayed indented. For each item of the set, the set number, the set item number, the number of all set items and the volume designation (element \x from subfield 996d) will be displayed.

If a set is made up of material from different bibliographic records, the general data on each set item will be displayed on the lending form. The leading item will not be displayed indented.

4.16.2   Return of a set

You can return a set or delete a reservation of the set in the following ways:

- in the **Home library material** window by entering identification number of any set item (accession number or loan number)

- in the **Home library material** window by selecting any set item from the list; this way you can also delete a reservation of unavailable set (material status is *R*), where identification number of the reservation is *<COBISS.XX-ID, accession number of the leading item of the set>*

- without selecting a member, by entering identification number of any set item (the **Unavailable material / Return, delete** method)

Procedure

1. In the **Home library material** window, read the identification number of the copy or select any set item from the list.

   If you return a set without selecting a member, read the identification number of any set item in the **Search by key** window.

2. Click **Return**.

> Tip:
>
> If you return a set without selecting a member, the **Return** button is already active in the **Home library material** window so you can press the <Return> key to confirm the return of material.
>
> If you return the material in the **Home library material** window, the return can be performed also by pressing <Alt> + <V>.

   The **Set** window with a list of all set items will open. The selected default value in the drop-down list is *returned*. On the list, the accession number of the read item is displayed in green. If you selected an item for return from the list, no item is selected in the window, so you must read the identification number of the selected item.

3. Read each individual set item.

   When you confirm the last read set item, all set items are written off for the member.

If the loan period has expired and a fine is set in the price list for this type of a leading item, the fine is charged once for the complete set and is entered only for the leading item.

If a set is reserved, a notification will appear automatically when returning the set. The set will be allocated to the first member on the waiting list. A notification about received reserved set will be sent (if a member is subscribed to e-notifications for this) only once for all set items at the same time. Also, a slip with data on the received set (if a library prints slips with data on the received material) will be displayed only once. The slip contains short data on the leading item of the set, and for other items, data on accession number,

designation and set item are displayed. All items that a member is waiting for will get the status *W*.

If a library charges costs for notifications about availability of reserved material, the costs are calculated only once for the leading item of the set.

4.16.2.1 Return of an incomplete set

It might happen that a member returns an incomplete or a damaged set (e.g. a member might forget one item of the material at home, return an incomplete set or a set where one or more items are lost). In the following pages, procedures for the return of incomplete or damaged sets are described.

4.16.2.1.1 A member forgets a set item at home

If a member returns only a few set items but not all, highlight the item that was not returned and select *forgotten* from the drop-down menu. The read set items for which a return with restriction is entered will acquire the status *B – retained*, and set items that are not returned will acquire the status *C – outside loan*.

When a member returns the missing set items, enter the return of all set items in the **Set** window.

4.16.2.1.2 A member returns a damaged set

If a member returns a damaged set, enter the return of all set items (see chapter *4.16.2*), and mark the damaged set items with the status *6 – damaged*.

Procedure
1. In the **Home library material** window, read the identification number of the copy or select any set item from the list.

2. Click **Return**.

> Tip:
>
> If you enter the return of material in the **Home library material** window, you can perform the return also by pressing the key combination <Alt> + <V>.

   The new **Set** window with a list of all set items entered for the member will open.

3. Highlight the damaged item on the list and then select the value *status 6 – damaged* from the drop-down list.

   The accession number of the damaged item is displayed in grey. For the damaged set item, the value *6 – damaged* will be automatically entered into subfield 996q, and for the leading item of the set, the loan restriction *0d*

(subfield 996u) will be automatically entered. This will disable further loan of the set or allocating the set to the member who reserved it.

4. Read the undamaged items and do not change the default value *returned* in the drop-down list.

When you read the last set item, set items are no longer recorded for the member.

If a reservation for the set exists, a notification and a slip with data on the reserved set will be displayed, and the reservation will be deleted at the same time. The slip will contain a note that the set must be checked as the loan for this set is restricted.

What to do next   After you enter the damaged set, you can decide whether you wish to de-accession the complete set, remove the damaged item from the set or delete the status of the damaged item and delete *0d* in subfield 996u for the leading item. If the set was reserved, you have two options:

- if you decide to de-accession the set and this is the only set available for loan, you must notify members who already reserved the set about this;

- if the set is not de-accessioned and is available for loan, enter the reservation of the available set. Then prepare the set and notify the member.

4.16.2.1.3 A member returns a set with one or more items lost

If a member does not return all items of the set, enter the return of returned set items; for lost items, enter the loss.

Procedure   1. In the **Home library material** window, read the item identification number or select any set item from the list.

2. Click **Return**.

> Tip:
>
> If you enter the return of material in the **Home library material** window, you can perform the return also by pressing <Alt> + <V>.

The new **Set** window with a list of all set items entered for the member will open.

3. Highlight the lost item on the list and select *lost (loan status L)* from the drop-down list.

The accession number of the lost set item will be displayed in red.

4. Read the returned items and do not change the default value *returned* from the drop-down list.

When you read the last set item, return with restriction will be entered for the returned items of the set and the items will acquire the status *B –*

retained, and the items of the set that were not returned will acquire the status *L – lost*.

If a member *returns* the items of the set at a later time, enter the return of all set items by using the **Return** method. In the **Set** window, read all set items, including those items that were entered with the status *B – retained*.

If a set is reserved, it will be allocated to the first member on the waiting list. If a member is subscribed to e-notifications about received reserved material, the member will receive the notification, and a slip with data on the received reserved set will be displayed.

If a member *does not return* the lost item of the set, highlight the lost item in the **Set** window and select the status *8 – lost (holdings)* form the drop-down list; for returned items, perform the relevant procedure so that they are no longer recorded for the member. When you do this, the value *8 – lost (holdings)* will be automatically entered for the lost items into subfield 996q in the holdings data; for the leading item, loan restriction *0d* (subfield 996u) will be entered, which automatically disables the loan of the set.

If the lost set is reserved, the set will not be allocated to the member, who is the first on the list of reservations, because the value *0d* is entered for the leading item. A notification about the existing reservation and a slip with data on the reservation will be displayed, and the reservation will be deleted at the same time. The slip will contain notification that the set must be checked as the loan for the set is restricted.

When you enter the set with lost items, you can decide whether you wish to remove the item from the set and delete the value *0d* in subfield 996u and thus enable the loan, or you can de-accession the complete set.

For the reserved set, there are two options:

- if you decide to de-accession the set and this is the only set available for loan, you have to inform the members who reserved the set about it;

- if the set is not de-accessioned and is available for loan, enter the reservation of the available set, prepare the set for loan and inform the member that the material is waiting.

4.16.2.2   Returning the set with restriction

If you wish to check the material (e.g. toys) when they are returned and before they are put for loan again, enter return with restriction, which means that the material will still be entered for the member (status *B*). Only after the material is checked, it is no longer recorded for the member.

Procedure

1. In the **Home library material** window, read the item identification number or select any set item from the list.

2. Click **Retain**.

Tip:

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

The new **Set** window with a list of all items of the set entered for the member will open. In the drop-down list, the selected default value is r*eturned*. On the list, the accession number of the read item is displayed in green. If you select an item for return with restriction from the list, no item will be highlighted in the window so the identification number of the selected item must also be read.

3. Read each individual item of the set.

   When you confirm the read item of the set, the status *C* will change into status *B* for all set items. In this way, further loan for the set will be disabled or the set will not be allocated to the member who reserved it.

   When calculating the loan period expiry date, the time parameter *res* (status *R*) is taken into account for the leading item of the set. The date of entering the return with restriction is entered under "Date of return".

When creating overdue notices, overdue notices for the material with status *B* will not be prepared even if the date has already expired.

What to do next   When you finish checking all items of the set, you can return it by using the **Return** method. Because this is a set, all items must be read in the window with a list of set items (see chapter *4.16.2*).

4.16.2.3 Entering the loss of a set

If a member reports the loss of all set items and you would like to enter the loss but you do not want to delete the material from the member's records, enter the loss of the complete set.

Procedure   1. In the **Home library material** window, read the item's identification number or select any set item from the list.

2. Click **Return**.

Tip:

If you enter the return of material in the **Home library material** window, you can perform the return also by pressing <Alt> + <V>.

The new **Set** window with a list of all items of the set entered for the member will open.

3. Highlight all items of the set.

   To highlight all items of the set, press <Ctrl> + <A>.

4. Select the value *lost* (loan status *L*) from the drop-down list.

For all set items, the status *C* will change to status *L*, with the same status *L* expiry date; the time parameter *res* will be taken into account for the leading item of the set.

The date of entering the loss will be displayed in the 1st row of the 6th column.

When entering the lost set, the number of lost items under data on member conduct "Lost material (LOAN)" will automatically increase by the number of items in the set; in the **Home library material** window, the note indicator *LST* will be displayed in the right upper corner of the screen.

By entering the loss of the set, further loan of the set will be disabled and the set will not be allocated to the member who reserved it.

A member can also receive an overdue notice for the entered lost item when the status *L* expires.

If a member did not lose all items of the set, do the procedure as described in chapter *4.16.2.1.3*.

What to do next   If a member *finds* the material at a later time, return all items of the set by using the **Return** method. Read all items of the set in the **Set** window.

If a member *does not find* the material and informs the library about it, perform the relevant procedure so that items of the set are no longer recorded for the member by selecting any item of the set with status *L* and clicking **Return**. Then select all items of the set in the *Set* window and select the value *status 8 – lost (holdings)* from the drop-down list. All lost items in the holdings data will acquire the status *8 – lost*, and loan restriction *0d* will be set for the leading item of the set, which automatically disables the loan.

4.16.3   Loan renewal

Loan renewal for sets is possible only in the **Home library material** window.

Procedure
1. In the **Home library material** window, highlight any set item for which you wish to renew the loan period.
2. Click the **Renew** button.

   When renewing the loan period, the renewal period for the leading item of the set will be taken into account and the loan period will be renewed for all items of the set. Renewal restrictions are checked only for the leading item of the set (renewal period, restrictions in subfields 996u, 996p, 996q, restricted number of renewals for member).

4.16.4   Change of status expiry date

You can change the expiry date of the set status only in the **Home library material** window.

Procedure

1. In the **Home library material** window, double click to set the expiry date (7th column Due/ovrd).

2. Enter the new expiry date (copy the old date) and confirm by pressing the <Return> button.

   The expiry date will be changed for all items of the set.

4.16.5   Sets in the catalogue

In the catalogue, items that are part of the set and from the same bibliographic record are displayed together for each set separately. For each set, the set number and the set item number are also displayed. Items are sorted by the set number.

If set items are from different bibliographic records, they are not displayed together in the catalogue, only the set item that you found in the catalogue is displayed. For each item, the set number and the set item number are displayed. Thus, a set can be reserved based on any selected item.

> Note:
>
> *You cannot put a set from the catalogue on loan because the set must be complete.*

4.16.6   Reserving sets

Reservation of a set can be entered for the selected member in the catalogue (see also chapter *4.13*). When reserving a set, reservation validity period for the leading item is taken into account. Also, any reservation restrictions are checked only for the leading item. When checking restrictions for reserved items, a set is considered as one item, regardless of the number of items in the set.

4.16.6.1 Reserving available sets

If you select any item of the set that has the status *available*, all set items are entered as reserved with status *0 – available item reserved* for the member. When defining the reservation validity period, the time parameter *ord.* (reservation validity period for available material) is taken into account for the leading item of the set.

You can delete the reservation of available material if you read identification numbers of all set items. You can use the **Return** method in the **Home library material** window or the **Unavailable material / Return, delete** method (without selecting a member). Then read each item in the new window with a list of set items.

4.16.6.2 Reserving unavailable sets

Reservation of an unavailable set is associated with the accession number of the leading item. Reservation of the set is entered for the member with the entry of the leading item in the following form <COBISS.SI-ID, accession number of the leading item>. When defining the reservation validity period, the time parameter *res*. (reservation validity period) is taken into account for the leading item of the set.

Reservation of an unavailable set can be entered if you select an item for reservation from the set. If you select a bibliographic description for reservation within which at least one item has a set designation in subfield 996c, a notification will be displayed informing you that the reservation is not possible.

Reservation of an unavailable set can be deleted if you select the reserved set in the **Home library material** window and click the **Return** button.

4.16.6.3 Reserving a set for reading room use

Reservation of a set for reading room use is entered in the catalogue by selecting any item of the set (see also chapter *4.13.5*). A new window where a list of all set items is displayed will open. Each item of the set must be read. All set items with the same reading room reservation validity period are entered for the member, the time parameter *read*. (reading room reservation validity period) for the leading item is taken into account.

You can delete the reservation of the set for reading room use if you read the accession numbers of all items of the set. You can use the **Return** method in the **Home library material** window or the **Unavailable material / Return, delete class** method (without selecting a member). You must read each item in the new window with the list of set items.

4.16.6.4 Creating a list of reserved sets

As with other reserved available material, the **Unavailable material** / **Process reservations** method can be used to check if there are any new reservations of available sets (see also chapter *4.13.3*). Reservations are displayed for each set item separately, but under the accession number of an individual set item, accession numbers of all items that belong to the set are displayed.

4.16.6.5 Preparing reserved sets for collection

You can remove reserved sets from the shelves and use the **Unavailable material / Prepare reserved material for collection** method to prepare the sets for collection (see also chapter *4.13.1.1*). Read the accession number of any item of the set. A new window will open where a list of all set items will be displayed. Each set item must be read. All set items will get the status *W*

with the same reservation validity period, and the time parameter *wait*. (time period during which a member may borrow reserved library material) for the leading item is taken into account.

If a member is subscribed to e-notification service, one e-notification will be sent to the member, and a slip with data on the reserved set will be printed. Any costs of notifications about received reserved sets are charged only once.

4.16.6.6 Batch deletion of set reservations whose period of validity has expired

When you batch delete reservations, whose period of validity has expired, reservations of the complete set will also be deleted. In a report that is prepared after you delete expired reservations, the set items for which the reservation was deleted are displayed. It is automatically checked whether the set is reserved for another member. If it is, the set is allocated to the first member in the list of reservations. Notify members who selected an option of e-notification when deleting reservations about the expired reservations or received sets accordingly.

4.16.7   Insight into the library material status

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

4.16.8   Overdue notices

When you create overdue notices by using the **Overdue notices** / **Create overdue notices** method (see also chapter *8.1*), time parameters that are valid for the leading item of the set are taken into account for the set items. An overdue notice is entered for each set item separately.

In libraries that charge overdue notice costs by items, the cost is calculated only for the leading item of the set.

In overdue notice reports, each set item is displayed with the number of the set and designation of the set part.

4.17   LOAN IN MOBILE LIBRARY

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

> Tip:
>
> As online connection is probably not available at all mobile library stops at all times, application for entering loan procedures during this time is available and you can subsequently make adjustments with the local library database (see chapter *4.17.4*).

As the majority of loan procedures in the mobile library is the same as in libraries, this chapter contains only those procedures that are performed in the mobile library only (e.g. selection of mobile library stop, material arrangement in the mobile library, setting up special loan parameters, etc.).

4.17.1   Special settings

In libraries with departments you can highlight an individual mobile library department by entering the number of mobile libraries under "Number of mobile libraries" in the editor with data on the mobile library department. As libraries usually have only one mobile library department, enter number 1. When you highlight the mobile library department, methods for entering material transfer to and from the library become available, and controls related to the mobile library procedures are activated at the same time.

As the mobile library stops periodically at individual mobile library stops, time parameters for loan and opening times calendar must be set up accordingly. To set up time parameters for loan and opening times calendar, find the mobile library department, transfer it to the workspace and use the method **Department / Time parameters** or **Department / Calendar**.

4.17.2   Selecting mobile library stop

Before the mobile library starts operating, a mobile library stop must be selected. When you do that, all loan transactions that were carried out at the mobile library stop will be entered for the selected mobile library stop location.

When you log in to the mobile library department, a window with a list of mobile library stops will open. When you confirm the selected mobile library stop, data on the selected mobile library stop will be displayed after data on the login department in the title bar.

If you wish to change the mobile library stop, you can do this in the following two ways:

- in the **Home library material** window, select the relevant mobile library stop from the drop-down list for the selected member

- use one of the ways of transitioning to another department (e.g. **Department / Transition to another department**) and select the mobile library department again

4.17.3   Entering material transfer to and from mobile library

Due to shortage of space, a mobile library holds only part of the mobile library material; the rest of the material is in the mobile library closed stacks or in other library departments. In order for the actual material availability at the mobile library to be displayed, each item transferred from the parent library department to the mobile library must be entered. When the material is returned to the parent library, it must be removed from the mobile library records.

4.17.3.1 Entering material delivered from library to mobile library

Use this procedure when material is delivered from the closed stacks or other parent library departments.

Note:

Material that was not entered as delivered to the mobile library cannot be put on loan in the mobile library. Such material can only be reserved.

Conditions   You can enter delivery for material:

- that has a designation of mobile library sublocation (in element 1 of subfield 996/997d or in element E of subfield 996/997e) or was on interdepartmental loan to the mobile library department

- that is available or reserved (status *O*)

- that was not yet entered as delivered to mobile library

- that is available for loan

Procedure   1. Log in to the mobile library department.

   A window with a list of mobile library stops will open.

2. Select *permanent mobile library stop*.

3. In the **Department** class, find the mobile library department and load it to the workspace.

4. Highlight the department and select the **Transfer material to or from mobile library** method.

   The **Enter material transfer to or from mobile library** window will open. In the window, the radio button for entering delivery of material to mobile library is selected as default.

5. Enter the item identification number (accession number or loan number).

   The item is loaded to the workspace; at the same time you are returned to the **Enter material transfer to or from mobile library** window, where you continue with entry procedures.

   If material is a serial with several issues and you entered only accession number without issue designation, the **Select issue** window will open, where an individual issue can be selected. If you wish to enter delivery of several issues of the same volume, you must repeat the procedure for each issue.

   If material is reserved or is waiting for a member, a notification will be displayed, and you have to place the material to the appropriate place in the mobile library.

Tip:

Material that is located in the mobile library can be found in the **Field 996/997** search window. Under "Mobile library No.", enter the number of the mobile library (usually 1) and click the **Find** button. In the same way you can search for material in the **Catalogue** window if you would like to see information on the loan status of the material.

Information about the material being located in the mobile library will be displayed in the **Insight into the library material status** window if you use the **View** method, and in the **Catalogue** window within the loan status report.

4.17.3.2 Deleting material from the mobile library records

Use the procedure when you want to return material from the mobile library to the closed stacks or to other parent library departments.

> Note:
>
> *Material that was deleted from the records in this way can no longer be put on loan in the mobile library.*

Conditions   You can enter deletion from the mobile library material records for:

- material that was previously marked to be located in the mobile library

- available material

Procedure   1. Log in to the mobile library department.

A window with the list of mobile library stops will open.

2. Select *permanent mobile library stop*.

3. In the **Department** class, find the mobile library department and load it to the workspace.

4. Highlight the department and select the **Enter material transfer to and from mobile library** method.

The **Enter material transfer to and from mobile library** window will open. In the window, the radio button for entering delivery of material to the mobile library is selected as default.

5. Select the **transfer from mobile library** button.

6. Enter the item identification number (accession number or loan number).

The item is loaded to the workspace; at the same time you are returned to the **Enter material transfer to and from mobile library** window, where you continue with the entry procedure.

If a copy is not located in the mobile library or if it is still entered for the member, a notification will be displayed.

4.17.4   Entering loan procedures when working online in COBISS3/Loan is not possible

If the quality and strength of signal do not allow effective work with the COBISS3 software, loan procedures, return of material and loan renewals are entered in the **Offline COBISS/Loan in mobile library** application. Before you start working in the COBISS3/Loan, the application must be installed to your computer in the mobile library.

You can install the application by selecting the **Class / Install offline application in mobile library** method in the **Department** class. In the **Offline COBISS/Loan in mobile library** window, select the folder to which you wish to save the application. The folder *C:\Users\<username>\busC3Loan* is already set as default. At the same time, the application shortcut will be created on the desktop. As a rule, the application is installed only once.

When you are at the mobile library stop and you establish that you cannot work online in the COBISS3/Loan software module, activate the shortcut on your desktop and run the **Offline COBISS/Loan in mobile library** application. In the **Login to offline COBISS/Loan in mobile library** window, enter your username and click the **OK** button.

4.17.4.1 User settings

In the menu, select the **System / Settings** option. The **User settings** window will open, containing the following tabs:

- **User**, where you define the name and surname of the username you use to login to the application

- **User interface**, where you select the font, font colour and font size

- **Lending form**, where you select whether a window for selecting printer settings should open, enter the name of the person who will sign the lending form (e.g. *Librarian*) and greetings (e.g. *Thank you for visiting our library! We look forward to seeing you again soon.*)

Save the settings by clicking the **OK** button, or cancel the settings by clicking the **Cancel** button.
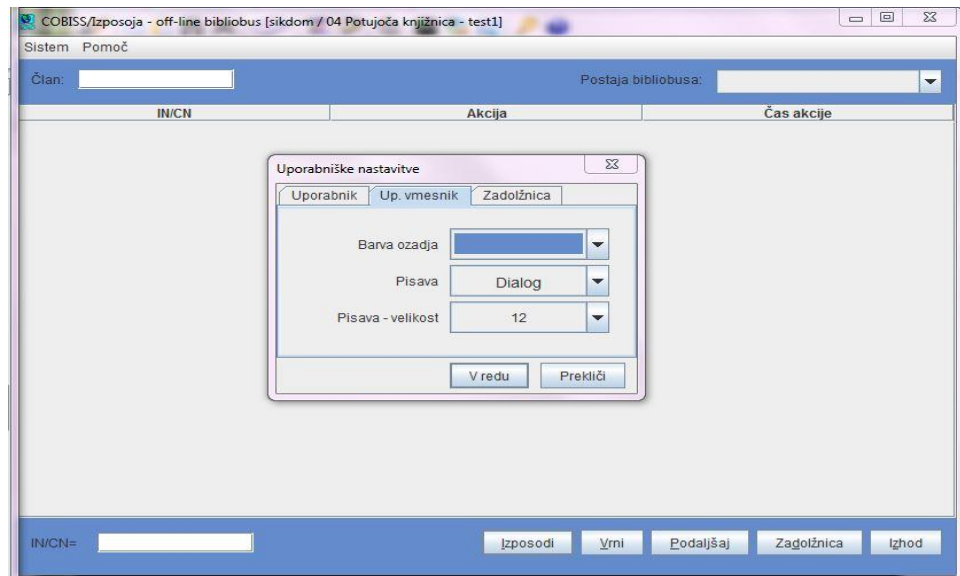
Figure 4.17 - 1: User interface settings

4.17.4.2 Entering loan procedures

The following loan procedures can be performed:

- loan of material

- return of material

- loan renewal

- printing lending forms

Note:

In the application you cannot enter new members, change member details, etc., as the application is not connected with the COBISS3/Loan software module and is intended only for entering the most common loan procedures, which are transferred to the COBISS3/Loan software module at a later time.

Use the application only when you cannot work online in the COBISS3/Loan software module.
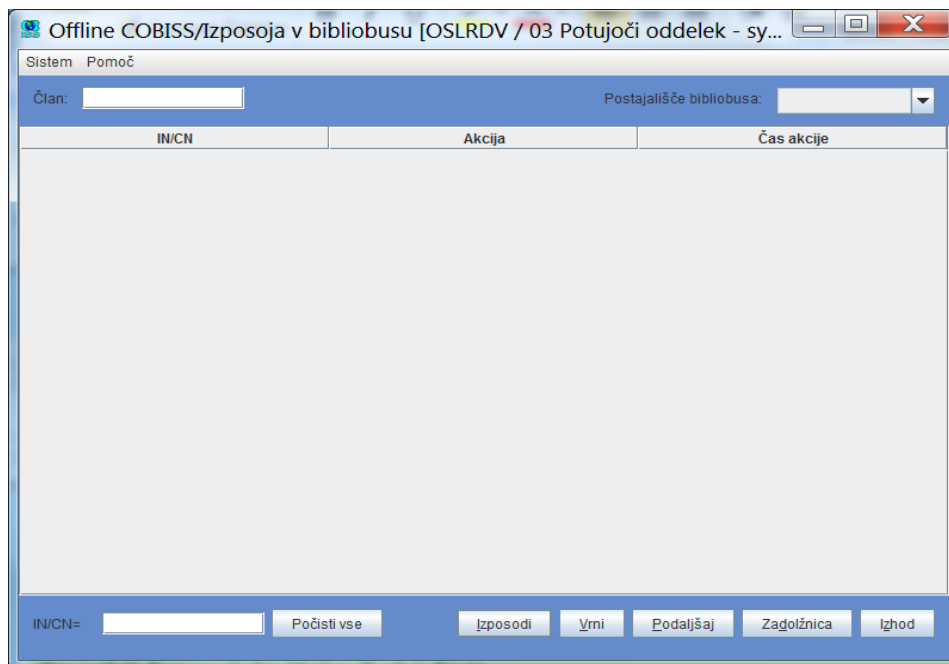
Figure 4.17 - 2: Basic user interface window

Before you start entering loan procedures, select a mobile library stop from the drop-down list under "Mobile library stop". Next, under "Member", enter (manually or with a barcode reader) the membership card number of the member for whom you wish to enter one of the possible transactions. Under "AN/LN", enter the accession number of the item that you wish to enter for the member. Depending on what you wish to do with the material, click one of the following buttons: **Lend, Return, Renew, Lending form**. If you wish to renew the loan period for all the items entered for the member, enter only the membership card number, and leave "AL/LN" empty.

> Note:
>
> *For serials with several issues, the entire identification number of the item ((<accession number>,<issue number>) must be entered. If there is only accession number on the label, identification number must be entered manually; if not, the transaction will not be transferred.*

> Note:
>
> *When entering member's identification number and item's accession number, be precise as the programme does not check if the entry is correct. Possible mistakes will be detected only in the procedure of transferring data into COBBISS3/Loan. Later on, it will be more difficult to detect incorrect entries for members or material.*
>
> *When you enter accession numbers with a barcode reader, select the procedure you will perform for the member before you read the barcode.*

Tip:

If you wish to cancel the entered transaction, you can delete it by clicking the right mouse button to highlight the transaction and then clicking the **Delete** button that appears in the screen tip.

Tip:

If you wish to delete contents under "Member", "Mobile library stop" and "AN/LN", click the **Clear all** button.

When you finish entering loan for a member and continue the procedure for the next member, first enter the identification number of the next member under "Member" and then start entering loan procedures.

Figure 4.17 - 3: Entered loan procedures for a member

After loan of material, return of material or loan period renewal, you can print a lending form for the selected member. To do this, click the **Lending form** button. On the lending form, the following data will be displayed:

- library name and department

- date and time of issuing the lending form

- membership card number of the member for whom procedures with material were entered

- procedure that was carried out for the item of material (Unavailable material for the loan of material, Returned material for the return of material and Loan period renewal for renewing loan period), and accession number or loan number used for the procedure

- data on the person who lent the material

- greetings

Note:

*Specific member details (e.g. name and surname) and data on the material (e.g. author, address, etc.) are not displayed on the lending form as there is no connection between the **Offline COBISS/Loan in mobile library** application and the COBISS3/Loan software module.*

When you finish entering loan procedures at the mobile library stop, close the application by clicking the **Close** button. At the next stop, where you will have to enter loan procedures via the **Offline COBISS/Loan in mobile library** application, open the application again, select the relevant mobile library stop from the drop-down list under "Mobile library stop" and start entering loan procedures.

4.17.4.3 Transferring entered transactions to the COBISS3/Loan software module

When you come to the mobile library stop, where you can enter loan procedures online, all transactions that were entered in the **Offline COBISS/Loan in mobile library** application will be transferred to the COBISS3/Loan software module.

Note:

*Transactions that were carried out in the **Offline COBISS/Loan in mobile library** application must be transferred to the COBISS3/Loan software module **at the first mobile library stop where you can work online**. It should be noted that members could lend the material, which was returned by members at the previous mobile library stop where procedures could not be performed online, at the next mobile library stops. If return of material that was returned at the mobile library stop where procedures could not be performed online was not transferred to the COBISS3/Loan software module, these items will not be available for loan.*

Note:

*Before you start transferring transactions, it is recommended that you log out from the **Offline COBISS/Loan in mobile library** application, and log in to the mobile library department in the COBISS3/Loan software module.*

In the COBISS3/Loan software module, highlight the **Department** class and select the **Class / Transfer transactions from offline application in mobile library** method, which enables entering all transferred transactions to the COBISS3/Loan software module.

If a transaction was not successfully transferred (e.g. membership card number of the member for whom the transaction was entered in the **Offline**

COBISS/Loan in mobile library application does not exist, the loan period was not renewed, etc.), the corresponding message will be displayed.

If you want to view detailed data on the transferred transactions, you can do this in the **Offline COBISS/Loan in mobile library** application. In the menu, select **System /View messages on the transfer of offline transactions**. The **Transfer offline transactions** window with a list of files with messages will open. The file name contains the date and time of the performed transfer (e.g. 10.09.2014 10:53:45). When you click on an individual line, a file will open in the editor, which is set to open txt. files by default. The following data will be displayed:

- date and time of transaction

- action performed on the basis of the transferred transaction

- member's membership card number

- accession number

- transfer status

- additional data on restrictions for the material or member.

When *OK* is displayed in the "Transfer" column, the transferred transaction is successfully entered. If *NOT OK* is displayed under status for an individual transaction, the transaction was not successfully entered. The reason for the unsuccessful transfer of the transaction is displayed in the "Action" column.

The second option for viewing detailed data on the transferred offline transactions is available also in the COBISS3/Loan software module.

Procedure

1. In the **Department** class, select the **View messages on the transfer of offline transactions** method.

   The **Transfer offline transactions** window will open.

2. In the *From* and *To* entry fields, enter the period of viewing messages on the transfer of offline transactions and confirm by clicking the **OK** button.

3. Select one or more files that are visible in the form of a timestamp and confirm by clicking the **OK** button.

   A file will open in the editor, which is set to open txt. files by default. If you select several files to view messages on the transfer of offline transactions at the same time, only one file will open, where all messages are displayed in individual sets, separated by a transverse line, according to the transfer of offline transactions.

6   SETTING UP THE DATE OF PROCEDURES

If you cannot record loan-related transactions automatically on a certain day (e.g. due to a computer failure), you have the option of doing it later by setting the date when the procedures should be performed.

Procedure

1. Select the **System / Settings / Set date for loan procedures** method.

   The **Date of procedures** window will open.

2. Under "Date of procedures", enter the desired date.

3. Save the changes.

   The date set up in such a way will be displayed in red in the **Home library material** window and will be taken into account when entering transactions under your username, until you change it or until you log in to the COBISS3 software again. The date will be taken into account when you register new members, edit member details, renew loan periods, change the due date, reserve the material, return or delete the material from member's records, automatically enter debts for fine or member's fee, return with restriction and record the loss of material.

> Note:
>
> *The date must be before the current date.*

> Note:
>
> *The date set up in such a way will not influence the date of the member's last visit; the current date is always entered as the date of the last visit.*

7.2   ENTERING DEBTS

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

7.2.1   Entering debts manually

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

7.2.2   Entering debts automatically

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

Currently it is possible to enter automatically:

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

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

- costs of notification when allocating reserved material to the member

- costs of overdue notices when creating overdue notices

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

7.2.2.1   Membership or admission fee

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

- parameter for controlling membership validity is set

- price for membership fee or admission fee for which the value in "Calculation method" is set to automatically is entered to the price list for a certain member category

- member is not exempt from membership fee (check box in *Exempt from membership fee* is not checked)

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

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

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

- debt for the member

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

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

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

Membership validity is defined in one of the following ways:

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

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

Note:

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

Tip:

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

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

7.2.2.2   Fine

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

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

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

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

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

Debt amount for the fine is calculated when daily fine is multiplied by the number of days of delay starting from expiry date. All copies are already selected in the **Fine** window by default. If you do not wish to charge the fine for some copy, you can deselect it. Confirm the selection by clicking the **OK** button. If you do not select any copy or if you close the window by clicking the **Cancel** button, you will discard the debt for the fine, although you can perform the desired procedure with the material.

Tip:

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

Tip:

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

Tip:

If the library allows returning of material without charging the fine because the material is returned within a specific period after loan period expired, this period must be defined in time parameters table (see chapter *2.1*). If the material is returned within this period, the fine will not be charged, but the first day after this period expires, the fine will be charged for all days of delay.

At library's request it is possible to set a special parameter that does not take into account grace period when calculating the number of days of delay.

Tip:

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

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

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

7.2.2.3   Notification about available reserved material

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

- the price for notification about available reserved material is entered to the price list and the value automatic is entered in "Calculation method"

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

Debt for notification about available reserved material is automatically entered:

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

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

If the conditions for entering debt for notification are fulfilled, the **Cost of notification about availability of reserved material** window will open. Details of the member to whom the reserved material is allocated after returning and the amount of debt will be displayed. If you answer the question affirmatively and click the **Yes** button, the debt will be entered automatically.

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

7.2.2.4   Costs of overdue notices

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

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

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

Costs of overdue notice can be specified in two ways:

- from the price list on the basis of the amount which represents the costs

of the overdue notice (e.g. costs for the 1st overdue notice) regardless of for how many copies the member received this overdue notice

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

Note:

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

7.2.2.5   Loan fee or wear and tear fee

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

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

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

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

After clicking the **Lend** or **Renew** button, a question whether you wish to enter the debt, data on the selected material and the price for the loan fee will be displayed in a new window. If the answer is yes, the loan fee amount will be added to the amount of entered debts for the member.

Note:

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

– if the loan period expiry date is changed manually

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

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

8   OVERDUE NOTICES

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

Subchapters:

- Creating overdue notices
- Printing overdue notices
- Cancelling creation of overdue notices
- Deleting individual overdue notices
- Creating overdue notice forms

8.2   PRINTING OVERDUE NOTICES

Forms for overdue notices are usually printed right after they are created by clicking the **OK** button in the **Sending overdue notices** window. You can print overdue notices later in one of the following ways:

- by using the **Class / Send overdue notices** method if you select the **Overdue notices** class

- by using the **Object / Send** or **Object / Print** method if you click the selected overdue notice

- in the COBISS3/Reports module (see chapter *A.2.6*).

Note:

*You can also print already sent overdue notices (those are overdue notices in black or green colour) in the COBISS3/Loan module by using the **Object / Send** method or in the COBISS3/Reports module by creating the report L-O-01: Overdue notices. Creating or printing of such report does not influence the status of overdue notice (colour). It also means that if you print unsent overdue notices on a printer, they will remain red.*

The procedure of printing forms for overdue notices by using the method **Class / Send overdue notices** follows:

Procedure   1. Highlight the **Overdue notices** class and select the **Send overdue notices** method.

Data on overdue notices which are created, but not sent yet will be displayed in the **Sending of overdue notices** window. In libraries with departments data on unsent overdue notices is displayed for all departments.

2. Select the overdue notices and confirm the selection by clicking the **Send** button.

Overdue notices are sent to the printer selected for printing overdue notices (logical destinations *Overdue notices (envelopes) – Loan or Printer – Loan*).

Note:

Before printing on a printer it is always recommended to check if the paper is correctly inserted (especially for three layer carbon-copy envelopes).

When creating the report, the list of recipients of overdue notices for which the form for overdue notice was not printed because the member has no postal address is also printed in addition to forms.

Postal address defined to be used on overdue notices is printed on the form for overdue notice (see chapter *3.1.2.1.1*). If no address is defined for this purpose, the address will be defined in the following order: permanent address, temporary address, business address, guarantor's/guardian's address, guarantor's/guardian's permanent address, guarantor's/guardian's temporary address, address abroad.

Forms for overdue notices can be printed in two sizes:

- A4 – classical format which enables printing of overdue notices on the paper of A4 size and sending in envelopes with a window on the left or on the right.

- Format of the three layer carbon-copy envelope which enables printing of overdue notices on special envelopes having precise element layout on forms (those are library details, payment of postage, overdue notice recipient, etc.). Printing the list of material is limited in this case. If you are about to send an overdue notice for a large number of copies to a member, several envelopes can be printed depending on the length of the list. An appropriate matrix printer must be used for printing overdue notices on three layer carbon-copy envelope. Data on library, payment of postage and overdue notice recipient are printed on darkened fields. This data can be seen on the front side of the envelope, while the text of the overdue notice (list of material, signatory) can be seen only when the recipient opens the envelope.

Tip:
The contents of overdue notice forms can be defined and maintained by the library in the COBISS3/Loan software module (see chapter *8.5*).

8.5   CREATING OVERDUE NOTICE FORMS

The procedure of creating overdue notice forms is intended for creating, editing, activating and deleting overdue notices. The contents of the forms are specified and maintained by the library itself whereas the layout of the forms is specified and maintained by the library information service.

> Note:
>
> *If the library does not interfere with the procedure of creating overdue notice forms, the default overdue notice forms are used when creating the report* LOAN-ON-01: Overdue notices. *The default forms contain the basic data and text in the domestic language, the default report format is in A4 format with the member's address on the left side (envelope with clear window on the left side). Default forms cannot be edited or deleted.*

> Note:
>
> *To create overdue notice forms, the privilege* LOAN_OVR – Overdue notices *is required.*

> Note:
>
> *If the library already had edited customised texts for creating overdue notices (Postage paid (overdue notice), Introductory text (overdue notice), Conclusion text (overdue notice), Signature on overdue notices) in their user variable definitions, the customised content of the overdue notice forms must be edited with the **Overdue notices / Create overdue notice forms** method.*

Procedure

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

   The **Creation of overdue notice forms** window will open where the data on the currently valid overdue notice forms is displayed. In the beginning, the default forms are active.

2. Select the procedure you wish to use to continue with the activities for maintaining overdue notice forms:

   - Create new forms
   - Edit forms
   - Activate forms
   - Delete forms

3. Once you click the **Select** button, continue with the selected procedure or abort the procedure by clicking the **Exit** button.

8.5.1   Creating new forms

Select the option of creating new overdue notice forms if you wish to create a new group of overdue notice forms. You can create a new group of overdue notice forms on the basis of default forms or with the help of previously prepared forms.

Procedure

1. In the **Creation of new overdue notice forms** window, select the **Create new forms** radio button.

2. Confirm the selected procedure by clicking the **Select** button.

    The **Create new forms** window will open.

3. In the *Form group* field, enter the name of the new group of forms and confirm by selecting the **OK** button.

> Note:
>
> *Groups of new forms are saved in the form of a file, so the following characters must not be used in the name of the form group: <, >, :, ",/, \, |, ?, *.*

The **Form groups** window will open.

> Note:
>
> *When you create overdue notice forms for the first time, the Form groups window will not open as no new forms had been previously prepared. In this case the data from default forms is used in the new forms.*

4. Select one of the previously prepared groups of overdue notice forms, which you can use to prepare new overdue notice forms.

5. Confirm the form group by clicking the **OK** button.

    The **Editing data on overdue notice forms** window will open. In the title bar you will also see the name of the new group of forms you will be editing. All data from the group of forms you selected in the previous step will be displayed in the window.

    The window is divided in three parts:

    In the upper left part of the window is a table, where numeric values, which are used in the selected form group, are displayed. If a library has no departments, there is only one row in the table. If a library has departments, the number of rows in the table equals the number of departments with automated loan. The names of the six columns are displayed in the title bar of the table.

Individual table columns contain:

1. Column 1 – **Applies to**

   In libraries with departments, names of departments with automated loan are displayed in individual rows, for which the data specified on the overdue notice forms will be taken into account. In libraries with no departments, there is only one row in this column, where *Home library* is displayed.

2. Column 2 – **Format and address position**

   In this column, by clicking the selected table cell, a drop-down list will open, where you can select one value to specify the format and address position. You can select one of the following values:

   - *0 – A4 format/address left*
   - *1 –A4 format /address right*
   - *2 – three-layer carbon-copy envelope*

3. Column 3 – **1st overdue notice**

   In the table cell, numeric values for data that is used on the first overdue notice form are displayed.

4. Column 4 – **2nd overdue notice**

   In the table cell, numeric values for data that is used on the second overdue notice form are displayed.

5. Column 5 – **3rd overdue notice**

   In the table cell, numeric values for data that is used on the third overdue notice form are displayed.

6. Column 6 – **4th overdue notice**

   In the table cell, numeric values for data that is used on the fourth overdue notice form, are displayed.

> Tip:
>
> If you wish to see a description of numeric values in the table, you can use the screen tip by placing the mouse cursor on the selected cell. The screen tip will successively display the data types that are specified in the selected cell and will be taken into account on the overdue notice form.

In the upper right part of the window, you can select the data type that you wish to edit from the drop-down list. In one group of overdue notice forms, one or more data types can be edited. An individual data type can have different content versions, depending on the number of overdue notice or department where the overdue notice is prepared (in libraries with departments).

When you first edit the data, the default content of an individual data type will be displayed under the selected data type. An individual content version is marked with a number, based on which the selected content is displayed in columns from the first to the fourth overdue notice.

Positions of individual data types on the overdue notice form are displayed on the overdue notice template for A4 format (see figure 8.5-1). These data types can be edited.

> Note:
>
> For multi-layer envelopes, restrictions with regard to the quantity of entry of variable data must be taken into account when editing overdue notice forms due to the specified positions of data.

You can select one of the following seven data types:

1. **Additional data under the library address**

   On the default overdue notice forms, only the general library address data is displayed, so this data type is blank in the beginning. On the overdue notice, additional data will be displayed under the general library address (e.g. e-mail address, telephone, fax, opening hours, etc.).

2. **Postage (multi-layer carbon-copy envelope)**

   This data type contains the default value *Postage paid to post office ...*, which specifies the post office number and the name of the post office where overdue notices are sent to members. The default value can be edited or new content version can be added. This data type is edited only if the library uses multi-layer carbon-copy envelopes.

3. **Overdue notice number (name)**

   For this data type, the variable value *%received overdue notice%* is already used, for which the appropriate number of the overdue notice received (1st OVERDUE NOTICE, 2nd OVERDUE NOTICE, 3rd OVERDUE NOTICE, 4th OVERDUE NOTICE) will be automatically displayed. If a library wants to specify a different form of numbering overdue notices or enter the overdue notice name in the text form (e.g. Director's notice, Overdue notice before the lawsuit, etc.), a new content version must be defined, which will be used in the group of overdue notice forms.

4. **Introductory text**

   The data type *Introductory text* has a default general text, which can be edited or you can add new content versions.

5. **Conclusion text**

   The data type *Conclusion text* has a default general text, which can be edited or you can add new content versions.

6. **Signature on overdue notices**

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).

Marija Novak
Prešernova ulica 17

2000   Maribor

1. Additional
data under the
library address

Univerza na Primorskem Universita' del Litorale
04 - Knjižnica FHŠ
Titov trg 5
6000 Koper - Capodistria   09.04.2014
e-pošta: knjiznica@izum.si
tel.: +386 2 252 03 33
fax: +386 2 252 03 33
urnik odprtosti: vsak dan od 7.00 do 19.00

3. Number
(name) of
the overdue
notice

0402363 Marija Novak

1. OPOMIN

Obveščamo vas, da je gradivu, ki ste si ga izposodili, potekel rok izposoje:

4.
Introductory
text

Rok: 20.11.2013 TI=Justifying legal punis... AU=Primorac, Igor
Rok: 20.11.2013 TI=The principles of mora... AU=Bentham, Jeremy
Rok: 20.11.2013 TI=Outlines of the philos... AU=Hegel, Georg Wilhelm Friedrich
Rok: 20.11.2013 TI=Broken bodies, shatter...
Rok: 20.11.2013 TI=Taking rights seriousl... AU=Dworkin, Ronald
Rok: 20.11.2013 TI=The province of jurisp... AU=Austin, John
Rok: 27.11.2013 TI=Popravki pesniške zbir... AU=Potocco, Marcello

5. Conclusion
text

Vljudno prosimo, da vrnete gradivo in poravnate zamudnino ter strošek opomina.

Cena opomina: 3,76 EUR
Zamudnina na današnji dan: 113,64 EUR
Skupni dolg člana: 3,76 EUR

vodja knjižnice

6. Signature on
overdue notices

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 previosly 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.2 GROUPS AND REPORTS DESCRIPTION

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

Loan reports are divided into four basic groups:

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

A.2.1 Members

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

- **LOAN-Mb-01: Selected members** is a report containing a list of members whom you found and selected in the **Search – Member** search window.

- **LOAN-Mb-02: Active members** is a report containing a list of members for which the date of the last visit still falls within the period specified in the parameter "Period" when creating the report.

- **LOAN-Mb-03: List of members with notes** is a report containing a list of members whom you found and selected in the **Search – Member** search window and for whom a note was entered.

- **LOAN-Mb-04: Deleted members** is a report containing a list of members whose data was deleted within certain period of time. The beginning and the end of that period of time is specified during report creation.

- **LOAN-Mb-05: Members - changed details** is a report containing a list of members whose data was changed within certain period of time. The beginning and the end of that period of time is specified during report creation.

- **LOAN-Mb-06: Active members - by department** is a report containing a list of members for which the date of the last visit still falls within the period specified in the parameter "Period" when creating the report. The department is specified during report creation. The report

can be created only in libraries with departments.

- **LOAN-Mb-07: Statistics of updating member details – students** is a report containing data on the performed update of registered members with data from the reference students database. Entry parameters for the creation of the report are: date of update (mandatory) and type of update. Summary data on the performed updates for members are displayed on the report first, followed by lists of members for each type of update.

A.2.2   Material

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

- **LOAN-Mt-01: Material by transaction** is a report containing a list of material, for which different transactions were performed within a certain time period. Before you create the report, you have to specify the type of transaction, the type of material, and the beginning and end of the period.

- **LOAN-Mt-02: List of most requested material** is a report containing the list of most requested material (by number of loans, renewal periods and reservations) within a certain time period. The fifty most requested titles are included in the list. Before you create the report, you have to specify the beginning and end of the period and the type of material.

- **LOAN-Mt-03: Material in mobile library** is a report containing a list of material that was delivered to the mobile library. Before you create the report, you have to select the mobile library number (the default value is 1).

- **LOAN-Mt-04: Unavailable material in mobile library** is a report containing a list of material that was delivered to the mobile library and is entered for members (unavailable). Before you create the report, you have to select the mobile library number (the default values 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 of time. When creating the report, you can specify the beginning and the end of the period, class or grade of the member, member category and study programme. In libraries with departments you can create a list for individual department by entering the "Library department" parameter. If you do not specify the parameter, the report will be created for all departments.

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

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

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

Tip:

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

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

A.2.4   Transactions

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

You can select one of the following report types:

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

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

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

A.2.5   Cash register operations

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

You can select one of the following report types:

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

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

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

A.2.6   Overdue notices

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

You can select one of the following report types:

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

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

  Besides the forms, a list of recipients without address will be also

prepared when creating this report. Overdue notice is not printed Overdue notices are not printed for members who have no postal address.

Note:

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

Note:

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

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

  On overdue notice forms, different types of data can be changed; thus, 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 read more about the options of creating overdue notice forms in chapter *8.5*.

B LOAN STATISTICS

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

- LOAN-STA-Mt01: Loan - by type of material/active months
- LOAN-STA-Mt02: Loan - by type of material/months
- LOAN-STA-Mt03: Loan - by type of material (physical form)/months
- LOAN-STA-Mt04: Loan - by UDC and language/active months
- LOAN-STA-Mt05: Loan - by UDC/language/months
- LOAN-STA-Mt06: Loan – by type of material/member category (school libraries)
- LOAN-STA-Mt07: Loan –by class/active months
- LOAN-STA-Mb01: Visits by members – by member category/months
- LOAN-STA-Mb02: Visits by members – by member category/days
- LOAN-STA-Mb03: Active members – by member category (school libraries)
- LOAN-STA-Mb04: Visits by members – by class/months
- LOAN-STA-Mb05: Visit by members – by class/day
- LOAN-STA-Mb06: Active members – by member category
- LOAN-STA-T01: Transactions – by member category/months
- LOAN-STA-T02: Transactions – by member category/days

Subchapters:

- Creating and printing statistical reports
- Description of statistical reports

B.2 DESCRIPTION OF STATISTICAL REPORTS

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

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

The report contains the statistics on the loan for selected period of time, where the number of copies on loan is arranged according to the type of material. The report only contains columns for those months when the material was put on loan (i.e. active months). In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

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

The report contains the statistics on loan for selected period of time, where the number of copies on loan is arranged according to the type of material. The report contains columns for all months, regardless of whether the material was put on loan or not. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

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

The report contains the statistics on loan depending on the type of material. The data on the number of copies of material on loan is sorted according to the NBM_1 table (see *COBISS2/Reports* User Manual, chapter *11.3.1*). The data on the selected time period is organised by individual months. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

B.2.4   LOAN-STA-Mt04: Loan - by UDC and language/active months

The report contains the statistics on loan for the selected time period. The data on the number of copies of material on loan is sorted by the language of the material for the defined UDC codes. The report only contains columns for those months when the material was put on loan (i.e. active months). In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

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

The report contains the statistics on loan for the selected time period. The data on the number of copies of material on loan is sorted by the language of the material for the defined UDC codes. The report contains columns for all months, regardless of whether the material was put on loan or not. In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

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

The report contains the statistics on loan for the selected time period. The data on the number of copies of material on loan are sorted by groups depending on type of material: *Books –total, Books – fiction, Serials* and *Non-book material.* The data in columns is sorted depending on groups of members in school libraries: *Pupils, Students* and *Others.* In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

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

The report contains the statistics on loan for the selected time period. The data on the number of copies of material borrowed by the members is sorted by classes. The report only contains columns for those months when the material

was put on loan (i.e. active months). In libraries with departments you can create a report for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments.

B.2.8   LOAN-STA-Mb01: Visits by members – by member category/months

The report contains the statistics on the number of visits by members for the selected time period. A visit is every transaction[1] that is recorded in the library in the same department within certain period of time. The default value is 60 minutes. In library with departments the visits are counted separately by departments. So, if a member visited two library departments within 60 minutes, it will be considered as two visits when preparing the statistics on visits. You can create a list for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments. The data on the number of visits is sorted by the member category by months.

B.2.9   LOAN-STA-Mb02: Visits by members – by member category/days

The report contains the statistics on the number of visits by members for the selected time period. A visit is every transaction[2] that is recorded in the library in the same department within certain period of time. The default value is 60 minutes. In library with departments the visits are counted separately by departments. So, if a member visited two library departments within 60 minutes, it will be considered as two visits when preparing the statistics on visits. You can create a list for individual departments by entering the parameter "Library department". If you do not specify the parameter, the report will be created for all departments. The data on the number of visits is organised by the member category by days.

Tip:

At library's request a special parameter can be used to set different time period for taking into account member's visit.

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[1] The following transactions are taken into account: new member, change of member data, change of membership card number, outside loan, reading room loan, reservation of currently unavailable material, reservation of available material, loan renewal, change of due date, return of material, start of routing, end of routing.

[2] Idem

B.2.10 LOAN-STA-Mb03: Active members – by member category (school libraries)

The report contains the statistics on active members in library for the selected time period. Active members are members who visited the library at least once in the selected time period. Data on the number of visits is sorted by member groups in school libraries: *Pupils or students, Students* and *Others.*

B.2.11 LOAN-STA-Mb04: Visits by members – by class/months

The report contains the statistics on the number of visits by members for the selected time period. A visit is every transaction[3] that is recorded in the library in the same department within certain period of time. The default value is 60 minutes. In library with departments the visits are counted separately by departments. Thus, if a member visited two library departments within 60 minutes, it will be considered as two visits when preparing the statistics on visits. You can create a list for individual department by entering the parameter in "Library department". If you do not specify the parameter, the report will be created for all departments. The data on the number of visit by members is sorted depending on their class by individual months.

B.2.12 LOAN-STA-Mb05: Visit by members –by class/day

The report contains the statistics on the number of visits by members for the selected time period. A visit is every transaction[4] that is recorded in the same department within certain period of time. The default value is 60 minutes. In library with departments the visits are counted separately by departments. So, if a member visited two library departments within 60 minutes, it will be considered as two visits when preparing the statistics on visits. You can create a list for individual department by entering the parameter in "Library department". If you do not specify the parameter, the report will be created for all departments. The data on the number of visit by members is sorted depending on their class by individual days.

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[3] Idem
[4] Idem

B.2.13 LOAN-STA-Mb06: Active members – by member category

The report contains statistics on active members in the library for the selected time period. Active members are members who visited the library at least once in the selected period. Data on the number of visits are sorted by member category. Unlike the LOAN-STA-Mb03 statistics, where data on active members are sorted by member groups in school libraries (*Pupils or students*, *Students* and *Others*), in the LOAN-STA-Mb06 statistics, data is sorted by individual member categories.

In libraries with departments you can create a report for an individual department by entering the "Library department" parameter.

B.2.14 LOAN-STA-T01: Transactions – by member category/months

The report contains statistics on transactions recorded when updating member's details or during the procedures related to material (e.g. loan, reservation etc.) within the selected time period. Unlike the statistics LOAN-STA-C01, LOAN-STA-C02, LOAN-STA-C04 and LOAN-STA-C05, the report LOAN-STA-T01 includes all transactions for the same member within the selected period regardless of whether they were recorded within 60 minutes or more in library or via COBISS/OPAC. Data on the number of transactions are sorted depending on member category by months. Therefore, it makes sense to select one of the transactions related to members in the parameter "Transaction".

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

B.2.15 LOAN-STA-T02: Transactions – by member category/days

The report contains statistics on transactions recorded when updating member's details or during the procedures related to material (e.g. loan, reservation etc.) within the selected time period. Unlike the statistics LOAN-STA-C01, LOAN-STA-C02, LOAN-STA-C04 and LOAN-STA-C05, the report LOAN-STA-T01 includes *all* transactions for the same member within the selected period regardless of whether they were recorded within 60 minutes or more in library or via COBISS/OPAC. Data on the number of transactions are sorted depending on member category by days. Therefore, it makes sense to select one of the transactions related to members in the parameter "Transaction".

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