

***COBISS***<sup>®</sup>

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Co-operative Online Bibliographic System & Services

***COBISS3/Loan***

***V6.1-01***

User Manual

Institute of Information Science, Maribor, Slovenia

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to the V6.1-00 version of COBISS3 software, and are also valid for all future software versions until they are withdrawn or another electronic version is published.

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## 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





## 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.

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### 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).*

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## 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 are:

- Access to OCLC database

If this privilege is granted, the member can access OCLC database via COBISS/OPAC. The privilege can be granted only by the authorised person in the library 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 makes sense 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 make sense 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 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:

*As a rule, 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 delete 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.



## 3.5 CHANGING THE MEMBERSHIP CARD NUMBER

If a member loses his/her membership card, a new membership card can be issued to the member. In such a case, the member details do not have to be entered again, you only have to change the membership card number.



Note:

*To change the membership card number the privilege LOAN\_RENAME – Changing membership card No is required.*

### *Procedure*

1. In the Member class, find and select the member by using one of the options (see chapter 3.6).
2. Use the **Change of membership card number** method from the shortcut menu for the selected member.

The **Membership card number** window will open. Use it to assign the new membership card number in the same way you defined the membership card number for the first time (see chapter 3.1.1).



Note:

*Once the new number is confirmed, the membership card number is changed. The action cannot be cancelled!*

3. To confirm the assigned number, click the **OK** button.  
The member editor will open displaying the new membership card number. If necessary, you can edit other member details as well.
4. To print out the new membership card label, click the **Label** button.
5. If you edited any other member details, leave the editor by clicking the **OK** button, otherwise click the **Cancel** button.

The old membership card number is automatically saved to **Invalid numbers**.



Note:

*You cannot assign an old number to a new member. If you try to use an invalid number for member identification, a warning message will appear.*



## 3.7 CHANGING CLASS OR GRADE

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

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



Note:

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

### Condition

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

To change the class or grade:

### Procedure

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

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

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

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

3. To save the table, click the **OK** button.

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

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

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

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

During the procedure, automatic messages will appear.

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

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



Note:

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



Note:

*To batch delete data on inactive members, the privilege LOAN\_DEL\_INACT – Batch deletion of inactive members is required.*

### Procedure

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

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

- Sorting of data on report

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

- Execution time

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



Note:

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

3. Click the **OK** button.

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

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

- number of inactive members who will not be deleted as they have not settled their debts
  - number of inactive members who will not be deleted as a note is entered for these members
  - number of inactive members who will be deleted
4. If you wish to continue the procedure, click the **OK** button.

Two control lists will be prepared:

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

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

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

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

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



Tip:

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

---

### 3.8.2 Batch deletion of data on selected inactive members

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

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

- as an inactivity criteria, you can set any number of years since the last visit, whereby the number of years must be 2 or more
- a condition related to membership expiry will not be considered (data will not be deleted, even if the membership expired a year or more ago)
- a condition related to a membership category will not be considered (data on non-natural persons, if they are among the selected members, will also be deleted)

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

### *Precondition*

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

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

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

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

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

- material (on loan, reserved, etc.)
- debt
- note
- pending ILL request or material from pending ILL requests

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

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



Note:

*To batch delete data on selected inactive members, the privilege CIR\_DEL\_INACT – batch deletion of inactive members is required.*

### *Procedure*

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

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

- Number of years from the last visit

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

- Sorting of data on report

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

- Execution time

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



Note:

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

3. Click the **OK** button.

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

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

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

- number of selected members
- number of members who have not visited the library for the selected number of years or more
- number of inactive members who will not be deleted as material is entered for the members
- number of inactive members who will not be deleted as pending ILL requests or material from pending ILL requests is entered for the members
- number of inactive members who will not be deleted as they have not settled their debts yet
- number of inactive members who will not be deleted as a note is entered for the members
- number of inactive members who will be deleted



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

Two control lists will be prepared:

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

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

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

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

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



Tip:

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



## 3.9 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.*

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### 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.

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

---

## 5 COUNTERS

When entering new library members, you can allocate a new membership card number by using the automatic counter which offers you the first available membership card number in relation to the last number allocated by the automatic counter. If there is an error in the counter (incorrect number in "Search from"), you can set the counter manually. To set up the counter manually, the privilege *LOAN\_OPER – Setting lowest counter value* is required.

In libraries with departments which keep records on members separately by departments the counter must be set up for each department separately.

### *Procedure*

1. In the **Counters** class, find and select the counter.

Since the class only contains one object (the counter), you can load it onto your workspace by double-clicking the **Counters** class.

2. Select the **Object / Edit** method.

The **Counters** editor will open.

3. Under "Counter for "Search from"", enter the desired number.

4. Save the changes.

The number you entered will be displayed under "Search from" next time you enter a new library member.



Note:

*Counter changes are only used in those libraries, in which the membership card number for new library members is allocated by using an automatic counter.*





## 7.1 MANAGING PRICE LIST

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



Note:

*To manage price lists, the privilege CRO\_PL – Price list management is required.*

---

### 7.1.1 Entering price list

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

In libraries which organised the loan by departments the same price list can be applied to all departments or every department can have its own price list. The option to enter price list for every department separately is set up by special parameter at library's request.

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

#### **Procedure**

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

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

2. Define price list validity.

You can select:

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

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

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

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

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

**Price list status upon creation**

Price list

- *in preparation*

### 7.1.1.1 Selecting group of services or debts

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

- Services/debts – member category (LOAN)

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

- Services/debts – type of material (LOAN)

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

- Services/debts – unit (LOAN)

You will enter the prices for overdue notices (if you charge the costs for each overdue notice regardless of the number of units on the overdue notice), for notification about available reserved material and for reservation of available copies to this group.

- Services/debts – other (LOAN)

You will enter the prices for the services which are not related to price classes, e.g. price for photographs, lost material, etc. to this group.

- Services/debts (ILL)

You will enter prices for interlibrary loan services to this group. The procedure is described in the *COBISS3/Interlibrary Loan User Manual* (see chapter 11.3).

### 7.1.1.2 Entering and editing services or debts

**Procedure**

1. To enter new service or debt, click the **New object** button.  
The **Service/debt – group** editor will open.
2. Select the service or debt from the code list.

## 7.5 DELETING DEBTS

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



Note:

*To delete a debt, the privilege CRO\_DEL – Deleting debts is required.*



## 7.6 CANCELLING DEBTS SETTLEMENT

If you entered debt settlement by mistake or with incorrect amount, you can cancel it. Cancelled debt settlement means that the debt(s) is/are recorded as unsettled again. Cancellation refers to individual invoice, which means that several invoices could have been paid during one settlement.

### *Precondition*

To settle debt the cash register must not be closed. In libraries with departments, in a particular department you can cancel only those debt settlements which were also entered in that department.

### *Procedure*

1. In the **Member** class find and select the member.
2. Select the **Object / Entering and settling debts** method.

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



#### Tip:

If you are in the **Home library material** window, click the icon  under member's name.

3. Click the **View settled debts** button.

The **Parameters for checking** window will open. Use it to select the department (in libraries with departments) and the period for which you wish to see settled debts.

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

The **Settled debts** window will open. Use it to see the list of settled debts according to parameters which you entered.

5. Select the debt settlement that you wish to cancel and click the **Cancel** button.

The **Cancel** window will open where details are displayed. Confirm the cancellation by clicking the **Send** button in this window and print the cancelled invoice. By clicking the **OK** button you will only confirm the cancellation without printing. By clicking the **Cancel** button you can cancel invoice cancellation.

Cancelled invoice can be found in the search window of the **Invoice** class by checking **Yes** in the "Invoice cancelled" search field. Such invoice is displayed in red colour on the workspace. Cash register balance will be reduced by the cancelled amount.



#### Note:

*To cancel debts settlements, the privilege CRO\_CAN – Debts settlement cancellation is required.*



Note:

*Non-cash debts settlements, performed by payment outside the library, cannot be cancelled.*

***What to do next***

If you entered the debt that you cancelled for the member by mistake, you can delete it (see chapter 7.5).

## 7.7 CLOSING OUT CASH REGISTER AND PRINTING LIST OF INVOICES

At the end of the day or when the user completes his/her work, you will close cash register and print the list of invoices. The list of invoices shows cash register balance at closure and the list of all settled debts, including cancelled settlements.

### **Precondition**

Cash register has not been closed yet.

### **Procedure**

1. Highlight the **Cash register balance** class.
2. Select the **Class / Close cash register** method.

The window containing the list of open cash registers will open. In libraries with department only those cash registers which are open in department in which you are currently signed in as a user are displayed on the list. Data on department, username, starting data and current amount of cash and non-cash is displayed for every open cash register.

3. Highlight and select the cash register with the mouse.

It is possible to display details or to close the selected cash register. Before closing the cash register it is recommended to check the list of invoices.

4. By clicking the **Check invoices** button the list of open invoices will be displayed for the selected cash register.

Check the list of invoices and the final balance of cash and non-cash payments in the library. A list of non-cash payments that were performed outside the library (e.g. with Moneta in the My library service) can be printed on the report LOAN-CRO-01: List of invoices.

5. If the balance on the report matches the actual balance, click the **Close** button.

If you answer affirmatively, you can close the cash register and print the list of invoices.



Note:

*Closing the cash register cannot be cancelled. It is not possible to cancel debt settlements on an already closed invoice.*



Note:

*To close the cash register, the privilege CRO\_CCR – Closing out cash register is required.*

### **Options**

The list of invoices can also be printed from the COBISS3/Reports module as, if you select the report LOAN-CRO-01: List of invoices in the Business operations report group.





## 8.1 CREATING OVERDUE NOTICES

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



Example:

The member will receive overdue notice depending on grace period settings for individual overdue notices in time parameter table:

1. overdue notice = 3d means 3 days after loan period expiry
2. overdue notice = 7d means 7 days upon reception of the 1st overdue notice
3. overdue notice = 14d means 14 days upon reception of the 2nd overdue notice
4. overdue notice = 21d means 21 days upon reception of the 3rd overdue notice

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

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

### **Precondition**

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

- the member does not have the privilege *No overdue notices*
- it passed more time than the grace period for the 1st overdue notice in the time parameter table from the date of loan period expiry (if the grace period is not defined, the member will receive the 1st overdue notice the day after loan period expires)
- it passed more time from the date of reception of the previous overdue notice than the grace period for certain overdue notice (2nd, 3rd and 4th) in the time parameter table (if the grace period is not defined, the member will receive higher overdue notice one day later than the previous overdue notice)
- the member did not receive the last overdue notice the library sends for the material



Note:

*For the creation of overdue notices, the privilege LOAN\_OVR – Overdue notices is required.*



Note:

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

### Procedure

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

The **Create overdue notices window** will open where the date of the last overdue notice creation is displayed. In libraries with departments the list of departments which you can access by your username and data on the last overdue notice creation for every department is displayed.

If you have already created overdue notices, but you did not sent them yet, a warning message will be displayed in the right window.

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

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



Note:

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

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

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

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

It makes sense to send the created overdue notices as soon as possible. The overdue notices are created on the basis of predefined forms (see ch. A.2.6).

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

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

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



Note:

*Sent overdue notices cannot be cancelled!*

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

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

- note indicator *OVR* will be displayed in the upper right corner; in libraries with departments this indicator is displayed if the member has an overdue notice in any department; *OVR* indicator is automatically deleted when there is no overdue notice recorded for the member
- date of the last overdue notice receipt is displayed on the list of material in the column *Due/ovrd* (7th column) for the copy
- number of the last received overdue notice is displayed on the list of material in the column *Delay/ovrd/No.* (8th column) for the copy

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

- on the **General** tab the "Current overdue notices" check box is ticked; this value is automatically changed when the member has no recorded overdue notices any more
- on the **Info** tab in "Date of last overdue notice" the date when the last overdue notice was sent to the member is displayed
- on the **Info** tab in "No. of overdue notices received" total number of overdue notices received by the member until that day is displayed; this number includes settled and unsettled overdue notices
- on the **Info** tab the "Received overdue notices" check box is ticked if the member received at least one overdue notice until that day; the values are entered automatically and can be changed if you delete the data on received overdue notices for the member manually (see ch. 8.4)
- in libraries with departments the data on the number of received overdue notices and the date of the last overdue notice can be seen in the **Details by department** window if you select individual department and click the **Show** button.

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

If the library charges the costs for overdue notices to the members, a debt for overdue notice will be entered automatically when creating overdue notices. You can see the debts for overdue notices for the member by using the **Entering and settling debts** method (see chapter 7.4).

**Tip:**

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

## 8.3 CANCELLING CREATION OF OVERDUE NOTICES

If you find out that you created overdue notices by mistake, you can cancel the procedure of creating overdue notices and restore the state before creating overdue notices.

### *Precondition*

To cancel creation of overdue notice the following conditions must be fulfilled:

- the privilege *LOAN\_OVR – Overdue notices* must be granted to your username
- overdue notices have not been sent yet
- only overdue notices which were created last can be deleted

### *Procedure*

1. Highlight the **Overdue notice** class and select the **Class / Cancel creation of overdue notices** method.

The **Cancel creation of overdue notices** window will open containing the date of the last creation of overdue notices. The list of departments which you can access with your username and data on the last creation of overdue notices for individual department will be displayed in libraries with departments.

2. Highlight overdue notices that you wish to cancel.

In libraries with departments you can highlight overdue notices for cancellation in one, several or all departments at the same time.

3. By clicking the **Cancel** button you will activate the procedure of cancelling overdue notices.



Note:

*The procedure of cancelling overdue notices can be scheduled by entering date and time in "Execution time".*

4. Wait until the **Cancel creation of overdue notices** window opens.

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

Overdue notices created on the selected date are deleted during the procedure of cancelling. It means that data on overdue notices for the member and material for which the member received overdue notice will be deleted. At the same time debt for overdue notice will be also deleted.



## 8.4 DELETING INDIVIDUAL OVERDUE NOTICES

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

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

When returning the material data on received overdue notice for the material is deleted automatically. If the member received the same overdue notice for several copies of material, data on overdue notice will be deleted when the last copy of material is returned for which the overdue notice was issued. Debt for overdue notice will remain as long as the member does not settle it.

- manually by deleting individual overdue notices for the selected member

The procedure of manual deletion is described below.



Note:

*To delete overdue notices manually, the privilege LOAN\_OVR – Overdue notices is required.*

### **Precondition**

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

### **Procedure**

1. Find and select the member in the **Member** class.
2. Select the **Object / Delete received overdue notices** method.

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

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

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





## 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).

The image shows a screenshot of an overdue notice template for A4 format. The text is as follows:

Marija Novak  
Prešernova ulica 17  
2000 Maribor

Univerza na Primorskem Univerzita' del Litorale  
04 - Knjižnica FHS  
Titov trg 5  
6000 Koper - Capodistria  
e-pošta: knjižnica@izum.si  
tel.: +386 2 252 03 33  
fax: +386 2 252 03 33  
urnik odprtosti: vsak dan od 7.00 do 19.00

09.04.2014

0402363 Marija Novak

**1. OPOMIN**

Obveščamo vas, da je gradivo, ki ste si ga izposodili, potekel rok izposoje.

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

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

stran 1/1

Annotations on the right side of the page:

1. Additional data under the library address
3. Number (name) of the overdue notice
4. Introductory text
5. Conclusion text
6. Signature on overdue notices
7. Price display at the end of the overdue notice

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!*

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## 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).

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## 8.5.3 Activating forms

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

**Procedure**

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

You can also select the default overdue notice forms.

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

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

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## 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.

## 9.2 COBISS3/INTERLIBRARY LOAN

Within the COBISS3/Interlibrary Loan software module, library members act as customers.

To perform interlibrary loan procedures for a member, the privilege *ILL\_BASIC* – *All procedures* is required.

In the list of entered material in the **Home library material** window you can see the home library material that you reserved or put on loan to a member through interlibrary loan. Material that is reserved for interlibrary loan can have the status *o* – *reserved available copy*, *w* – *waiting on the shelf (reserved)* or *r* – *reserved unavailable material*. Material that is put on loan through interlibrary loan has the status *m* – *borrowed through ILL*. For material that was reserved or borrowed through interlibrary loan, you cannot renew loan period, change the due date, record the return or delete reservation of the material in the **Home library material** window. These procedures must be performed in interlibrary loan.

Data on reservations for interlibrary loan can be seen in the list of reservations, which can be displayed by using the **View** method, and when you display search results of the material in the **Catalogue** window.