



COBISS3 software

Interlibrary Loan updates description

[Description of updates from version V13.0 onwards](#)

V13.0, 16–17 September 2023

- In the browser in the part of the window with modules and classes the option of selecting the **Invoice** class was removed. Also removed is the option of selecting document counters for invoices.
- In the **Notification elements** window, the **Select** button was added, which is used to copy material from pending ILL requests to the selected notification elements when preparing a notification for the customer or the supplier. Select the desired material by clicking on it, and then click the **Select** button. When preparing a notification for the customer, you can use the **Select** button (in the same way as when you copy material to the selected elements) to copy the desired standard-form text into the field.
- Bug fix:
 - when appointing material for interlibrary loan by recording a return in loan, if the interlibrary loan reservation is not entered in the ILL department.

V12.1.6, 10 June 2023

- Bug fixes:
 - for interlibrary loan (**Delivery note / Submit and send** method) of serial with no entered issue number in subfield "997m – First level of enum. (issue)" and is not from the ILL department;
 - when reserving a serial by clicking the **Reserve** button in the **Material** editor for the ILL request and then copying the item's accession number into the entry field.

V12.1, 4–5 March 2023

- Bug fix when preparing material for collection at the pickup location for interlibrary loan (in libraries where the pickup location functionality is activated).

V12.0.5, 4 February 2023

- Bug fix for interlibrary loan of a serial issue that is not from the ILL department.

V12.0.4, 14 January 2023

- Bug fix when reserving material by clicking the **Reserve** button in the **Material** editor for the ILL request and then copying the item's accession number into the entry field.

V12.0, 10–11 December 2022

- Due to the fact that the COBISS4 software is being developed simultaneously, it is now possible to reserve home library material for interlibrary loan by finding the material in the local catalogue in COBISS+, and then copying the accession number of the copy you wish to reserve to the clipboard (using the key combination <Ctrl + C>). Then, click the **Reserve** button in the **Material** editor (next to the ILL request). A window will open with an entry field, to which you copy the accession number of the copy you found in the local catalogue in COBISS+ using the key combination <Ctrl + V>. Once you click the **OK** button, some bibliographic data from the local database is copied to the material data in the selected ILL request and the material is reserved for interlibrary loan.

NOTE: The current access to the local database in the COBISS3 environment (**Catalogue** button in the **Material** editor) and the reservation of material by selecting it from the catalogue remain unchanged.

V11.0, 8–9 October 2022

- Bug fixes:
 - when reserving and interlibrary loan of material in the reading set;
 - when preparing the notification about a loan period expiry date;
 - in interlibrary loan (method **Delivery note / Submit and send**) of a serial which does not have the issue number entered in the subfield "997m – First level of enum. (issue)".

V10.0, 18–19 June 2022

- The creation and sending of notifications about a forthcoming loan period expiry date for material on interlibrary loan is no longer performed automatically within the package of electronic notifications for members that are subscribed to electronic notifications. It is only performed if the task type *CreateEmessForIll* is defined. A library that wishes to send their users notifications about a forthcoming loan period expiry date also for interlibrary loan must send a request for defining the task *CreateEmessForIll* to IZUM.

V9.1.1, 14 May 2022

- The error that occurred when reserving unavailable material if pickup locations are activated in the library was fixed.

V9.0, 2–3 April 2022

- The window that opens once you select the **Material / Prepare data for statistical reports** method now also contains the information on when you last prepared archival files with data that will be taken into account when preparing and printing statistics.
- The error that occurred when accessing the catalogue once the ILL request is closed was fixed.

V8.0.8, 15 January 2022

- The error that occurred when preparing archival files with data that will be taken into account when preparing and printing statistics was fixed.

V8.0.2, 4 December 2021

- The error that occurred when taking into account reservations of unavailable material in case of a lifted restriction for holdings that had been unavailable until then, if the reservation for interlibrary loan is in the first place on the list of reservations of this material was fixed.

V8.0, 27–28 November 2021

- The attributes "Customer name/symbol" and "Material" were added to the **Order** class. They can also be added to the user defined search results in the search window, or to the data export.
- Searching for material in the ILL catalogue is now harmonised with searching in the loan catalogue, and the limit for searching for material is raised to 2000 copies (the same as in the loan catalogue).
- Bug fixes:
 - when taking into account a reservation of unavailable material for ILL in case of new holdings (available for loan) or lifting the restriction for holdings that were previously unavailable, if the reservation for interlibrary loan is in the first place in the list of reservations for this material;
 - for reservations of an unavailable issue of a serial;
 - when entering the return of a serial, which does not have the issue number entered in subfield "997m – First level of enumeration (issue)";
 - when reserving material that is entered as retained in department (status *B* – retained);

- when preparing a delivery note for the loan of home library material, if you enter another available copy of material from another department (not the ILL department) instead of the reserved copy;
- when automatically entering the transfer of material from the mobile library when preparing reserved material for collection in interlibrary loan;
- when entering the return of the material to the customer in case of additional reservations for a member who is subscribed to e-notifications about received reserved material;
- when recording dates in the transaction file when cancelling a delivery note for the loan of home library material.

V7.0.11, 30 October 2021

- The error when entering the return of material to the customer in case of additional reservations for the member who is subscribed to e-notifications about received reserved material was fixed.

V7.0.8, 15 September 2021

- The error for interlibrary loan of a set of material from another department (not the ILL department) was fixed.

V7.0, 12–13 June 2021

- The regime for appointing reserved material was changed:
 - for interlibrary loan (with loan procedures and interlibrary loan procedures) and
 - for members in loan (with interlibrary loan procedures).
- If you delete a reservation of available material, entered with the status *O* or *O – through ILL*, and the first reservation on the list of reservations is a reservation for interlibrary loan, the copy will receive, when it is appointed for interlibrary loan, the status *O – through ILL* (previously *W – through ILL*). If you delete a reservation of available material for interlibrary loan, which is entered with the status *O – through ILL*, and the first reservation on the list of reservations is a reservation for a member who reserved the material in loan, then the copy will receive the status *O* (previously *W*) once it is appointed to the member.
- In libraries that enable their members to collect material at different pickup locations, the reserved material for interlibrary loan is now only prepared for collection at the pickup location for interlibrary loan. In a library with departments, when preparing the material for collection, interdepartmental loan is also recorded, if the material reserved for interlibrary loan is from another department (and not from the ILL department).

NOTE: Reservations for interlibrary loan that were made before the installation of the new version of COBISS3 software will not be placed to the pickup location for interlibrary loan yet. The reserved material must still be prepared for pickup (**To shelf (W)** method) at the reservation processing spots where the reservations for interlibrary loan were listed.

- Bug fixes:
 - when preparing material from the Mobile library department for collection, when the material is reserved via interlibrary loan;
 - when preparing another available copy for collection other than the one that was reserved, when the material is reserved via interlibrary loan.

V6.28-00(05), 8 April 2021

- The error that occurred when returning home library material on interlibrary loan from the Mobile library department was fixed.

V6.28-00(03), 16 March 2021

- The error that occurred when checking the desired delivery date that is still acceptable for the customer was fixed.

V6.28-00, 27–28 February 2021

- Orders saved automatically into the database are renamed (*COBISS/OPAC orders* to *COBISS+ orders*, *COBISS3/ILL orders* to *COBISS3/ILL orders*). In compliance with this change the values of some other attributes are renamed, too (e.g. the value of the attribute "Entered by" for ILL request and for received notification), software messages, names of folders with received orders and notifications sent via COBISS+ or as *COBISS3/ILL orders*, etc.
- The error that occurred when selecting the data in the definitions of reports *ILL-STA-C01* and *ILL-STA-C02* is corrected.

V6.27-00(07), 11 November 2020

- Bug fixes:
 - in displaying status order in COBISS+ when the material in the library is ready to be sent;
 - in sending documents via email;
 - when sending *COBISS3/ILL orders*.

V6.27-00(06), 4 November 2020

- Bug fixes:
 - methods for displaying reserved and loaned material from the home library stock are now called asynchronously;
 - optimisation for creating a new ILL request.

V6.27-00(02), 19 October 2020

- Bug fixes:
 - in specifying the sender (*From* field) in the notification received to the email for interlibrary loan, when the member sends a new order, a cancellation request, or a loan renewal request via COBISS+;
 - in displaying postalveolar consonants in the notification received to the email for interlibrary loan, when the member cancels an order or requests a loan renewal via COBISS+.

V6.27-00, 17–18 October 2020

- The *ILL_BASIC – All procedures* privilege does not enable the entry of the customer's return of material any longer (using either the **Enter return of material by customer** method in the **Material** class or in the **Received/delivered material** class or the **Enter return of material by customer (ILL)** method in the **Member** class or the **Partner** class) and the printing of the confirmation of material return by customer (using the **Print confirmation on material return by customer** method in the **Material** class or the **Received/delivered material** class). Consequently, it was renamed *ILL_BASIC – All procedures except entering the return of material by customer*. The *ILL_RETURN – entering the return of material by customer* privilege was implemented to enable the performance of the specified methods. This privilege enables the employees with privileges for working in the COBISS3/Loan module but without privileges for working in the COBISS3/Interlibrary Loan module to enter the return of material borrowed through interlibrary loan by member when entering the return of material by member. As return of material borrowed through interlibrary loan is entered within the interlibrary loan procedures, the local administrator can enable employees to enter the return of material borrowed through interlibrary loan and the printing of confirmation on the return of material borrowed through interlibrary loan if he/she adds the basic privilege for working in the COBISS3/Interlibrary Loan module (*ILL – Access to COBISS3/Interlibrary Loan, and data viewing and printing*) and the *ILL_RETURN – entering the return of material by customer* privilege.

The suggested procedure of entering the return of material borrowed through interlibrary loan by member for librarians who have not been performing interlibrary loan procedures so far: If you wish to enter the return of material borrowed through interlibrary loan by member, find and select the member first.

Open the folder **Customer – Material from pending ILL requests** on the object added to workspace and select the material (one or more items simultaneously) returned by the member (the status of such material: *on loan*). Afterwards use the **Enter return of material by customer** method (right click) for the material added to workspace. When the procedure of returning the material is completed for the selected material (the status of the material is changed to *returned by customer*), you can print the confirmation on material return by highlighting the material the return of which was just entered and using the **Print confirmation on material return by customer** method.

- **NOTE:** Once the COBISS3 V6.27-00 software is installed, the *ILL_RETURN* privilege will be automatically added for everyone with the *ILL_BASIC* privilege.
- A new report for printing confirmations on material return by customer on thermal printer prepared (narrow format).
- In the **ILL request** editor, the **Messages** button was added for exchanging messages with a member via COBISS+ (if ILL service is ordered by an ILL partner, the **Messages** button is not active). Once you click the **Messages** button, a window will open where you can either write a message for the member and send it to him or read a message sent to you by member via COBISS+. The window is divided into several parts, as follows:
 - the **All messages** window will open, where all sent and received messages appear, sorted from the oldest to the most recent ones in view of the entry date and time;
 - under "System data", the data on an individual message appears; you select the message by clicking on it in the **All messages** window; the username of the librarian who wrote and sent the message, the login department and the time of sending the message appear next to a sent message, whereas membership card number and time of sending the message appear next to a received message;
 - the **Enter message for member** window for entering a new message for a member.

Once you enter a new message for a member and click the **Send** button, the **Messages** window closes, the text of the new message is saved among all messages (sent and received) and the notification that a new message was written in reference to the ordered material is sent to the member by e-mail. By clicking on the link in the received notification and after successful login to the *My libraries* service, the member can view, among the pending interlibrary loan orders, the new message sent to him/her and answer it. If a member sends you a message, a notification is sent to your library's ILL e-mail address stating that a member sent you a message referring to the ordered material.

You can exchange messages with the member until the material is delivered to him/her (i.e. until the delivery note is submitted). After the delivery of the material and also after the processing of the ILL request is already completed, you can still view all the messages exchanged with the member, however, you cannot

send a new message to the member. In COBISS+ (after login to the *My libraries* service and selection of your library) the member can view all the received and sent messages and can send a new message referring to the ordered material until the delivery of the material.

- In the **ILL request** editor, under the **General** tab, a new attribute "Paid by" was added, where you can enter the date by which the customer must pay for the service. The data is entered in ILL requests with a member who has the role of a customer as it appears in COBISS+, in the *My libraries* service, among his/her pending ILL orders (table "Pending orders", column "Payment due"). In the ILL request, enter the date, by which you wish that the customer pays for the service, if you wish that the customer pays for the service before the delivery of the material.
- In COBISS+, the form for ordering material via interlibrary loan was changed. A member can no longer enter the permission for ordering material abroad; also, he/she cannot select the method of receiving notifications about the ordered material or the option of receiving SMS notifications about non-delivery and/or about received material so, when submitting an order, these details are no longer transferred to the ILL request. Consequently, in the received ILL request sent by a member via COBISS+, in the **ILL request** editor, *e-mail* is always defined as the method of notification; under the attribute "Note from ILL request", only a member's e-mail address is displayed among his/her contact details, whereas postal address, and fixed and mobile phone numbers no longer appear.
- Only a member who has already submitted to the library his e-mail address for receiving notifications (a member is notified about his/her order by e-mail by default) can order material via COBISS+.
- A member who ordered material via COBISS+ can receive neither SMS notifications about non-delivery nor SMS notifications about received material.
- Due to the new option of ordering e-resources via COBISS+, a new value *e-resource* is added to the code list for material type, among the data on the material in the ILL request. Orders for purchasing e-resources sent by members via COBISS+ are automatically saved among received ILL requests.
- If a member orders an e-resource through interlibrary loan via COBISS+, the following values are defined by default in the data on the material in the ILL request, under "Service type", "Type of material" and "Medium type": *purchase*, *e-resource* and *electronic resources*. You cannot change these values.
- Home library material cannot be reserved in reference to an ILL request for the purchase of an e-resource.
- The list of attributes that appear in the browser when selecting the data on the material from an ILL request is supplemented with the attribute "Link to material (SFX)". The link is saved when a member orders an e-resource (e-book, e-journal, article, etc.) via COBISS+. If the link is copied to a web browser, information about the availability of the material appears via the OpenURL linker.

- The **ILL request / Prepare delivery note for purchasing e-resource** method was added. It can be performed for an ILL request with the status *received*, *material specified* or *supplier specified* (supplier **is not** home library), and with the value *purchase* defined among the data on the material, under "Service type". A delivery note for the purchase of an e-resource can be prepared for several selected ILL requests simultaneously – in such a case the material is placed on the same delivery note. You can do this if the material from the selected ILL requests is then delivered to the same customer and in the same way, and if the payer of the service is the same.

V6.26-00, 25–26 April 2020

- Home library material that is on interdepartmental loan in the **ILL department** due to interlibrary loan, from now on when it is written off in interlibrary loan (when you enter the return of material on interlibrary loan or when you delete the reservation of available material for the ILL request), is no longer appointed to the member who is at the top of the list of reservations for this material in the **ILL department**, so it can be returned immediately to the host department. However, the material cannot be returned to the host department immediately, if there is a new reservation for interlibrary loan for this material at the top of the list in the **ILL department** and there are no reservations for this material in the host department, or if there is a new reservation for ILL for this material at the top of the list in the host department. In this case, the material on interdepartmental loan is appointed to the new ILL request.
- In the notification about a received order cancellation request (COBISS+), the library member's membership card number is now displayed instead of the member ID.
- The limit when searching for material in the interlibrary loan catalogue was raised to 800 copies of material.

V6.25-00(03), 29 February 2020

- In the search window of the **ILL request** class, the "Tax rate" and "Turnover type for VAT return" search fields were removed.

V6.24-00, 7–8 December 2019

- Bug fix when deleting a reservation of available material in interlibrary loan if a copy of material is reserved that is on interdepartmental loan and there are additional reservations in the ILL department for this material.

V6.22-00, 8–9 June 2019

- Bug fixes:
 - when searching for material in the catalogue; if, for the material, there is a list of reservations that includes interlibrary loan reservations, in libraries with departments, the place of the first ILL reservation no longer appears when searching for the material simultaneously in all departments;
 - when preparing the order for the supplier if the customer is a member and we want to order a serial issue, which is also in the home library.

V6.21-00, 16–17 March 2019

- Bug fixes:
 - when preparing a delivery note for the loan of home library material (**ILL request / Prepare delivery note**
 - **for the loan of home library material** method); if you prepare a delivery note for the loan of the available home library material copy you are holding in your hands and not the copy that is ready to be collected (and it has the status *W – waiting on the shelf (reserved)*), the newly selected copy receives the status *W – waiting on the shelf (reserved)*;
 - when preparing the order for the supplier if the customer is a member and we want to order a serial issue, which is also in the home library.

V6.19-00, 29–30 September 2018

- Software control is included when specifying the price for the interlibrary loan service. Libraries that are not identified for VAT purpose (the box for the "Identif. for VAT purpose" attribute in the home library details or the superior partner details is not checked) can only select the *Exempt from VAT* turnover type when entering the price for the delivered material in the **ILL request / Price, Received/delivered material / Price** editors and when entering indirect costs as well as additional indirect costs in the **Indirect cost** editor under the attribute "Turnover type for VAT return". Libraries that are registered for VAT can select any value.
- The reports *Delivery note* and *Attachment to delivery note* are updated. The data on the turnover in these reports is displayed according to the value of the attribute "Turnover type for VAT return".
- From now on, the default value of the attribute "Turnover type for VAT return" is *Exempt from VAT*.
- Bug fix in assigning the material of the home library for interlibrary loan – the ILL request with the assigned available copy of the material will be shown in red when selected on the workspace.

V6.18-04, 11 August 2018

- The error that occurred when allocating material for interlibrary loan upon the return of material on loan was corrected.

V6.18-03, 31 July 2018

- The error that occurred when allocating material from another department for interlibrary loan was corrected – when material from another department (not the ILL department) on loan with a member is allocated for interlibrary loan upon the return, the slip with reservation details for interlibrary loan is now also printed.

V6.18-00, 9–10 June 2018

- When entering items in the price list for ILL services, when specifying prices for delivered material and entering indirect costs it is possible to sort turnover into types when calculating VAT (e.g. *non-taxable transaction, exempt from VAT, 22% and 9.5%*). For this purpose, a new **Turnover type for VAT return** attribute has been enabled, which will replace the **Tax rate** attribute.
- If a library is not identified for VAT purpose (the box for the **Identif. for VAT purpose** attribute in the home library details or the superior partner details is not checked), it is only possible to select the *Exempt from VAT* turnover type. Libraries that are registered for VAT can select any value.

V6.15-00, 10–11 February 2018

- The error that occurred when sending documents to a partner from the COLIB database by e-mail was corrected – if no e-mail address for interlibrary loan is published for the library in the COLIB database, the e-mail address is not checked when sending documents to this library acting as an ILL customer or supplier.

V6.14-02, 20–21 January 2018

- The error when reserving a serial issue in an ILL request if there were volumes without an entered accession number on the bibliographic record was corrected.

V6.14-01, 21 December 2017

- In the catalogue, the number of records corresponding to the search request is also shown in the search results next to the number of fields 996/997.

V6.12-00, 17–18 June 2017

- Changing the introductory text in the Notification about a loan expiry date is enabled. In order to do that you copy the definitions of the variables *Notification about a loan period expiry date – text* and *Notification about a loan period expiry date – text (eng)* from the standards group of the variables to the user definitions group of the variables and change the text there.
- The error that occurred when processing the ILL requests for home library material, where the holdings data was relinked to a new bibliographic record, was corrected.
- The error that occurred when printing the English delivery note was corrected.

V6.11-00(01), 19 April 2017

- The error that occurred when returning home library material on interlibrary loan, for which a reservation for the department is at the top of the reservations list, was corrected.

V6.11-00, 15–17 April 2017

- The error that occurred when printing ILL requests in libraries that use the COBISS3/Loan software module was corrected. Among the data on the customer – member, the e-mail address and mobile phone number that are entered in the data for electronic notification of members is now also displayed.
- The error that occurred when sending several Order rejection notifications at the same time was corrected.
- The error regarding procedures (change of return date, entry of material return, etc.) for home library material on interlibrary loan was corrected. The error occurred in the case of additional reservations of this material, if a reservation for another department was at the top of the reservations list.

V6.10-03, 25–26 March 2017

- Based on the decision of the Information Commissioner as of 27 February 2017 (No.: 0612-16/2017/8) all documents, sent to customers – members by e-mail were changed (i.e. Order rejection notification, Notification about received material, Notification about a loan period expiry date, Delivery note (in pdf format), Confirmation on material return and general customer notifications). When these notifications are sent by e-mail, they no longer contain personal details of the member, but only the membership card number. There are no changes in documents, sent by e-mail to customers – partners.

V6.10-02(02), 13 March 2017

- The error that occurred when sending notifications about the rejection of the customer's ILL request to library members was corrected.

V6.10-00(01), 30–31 January 2017

- The error that occurred when accepting COBISS3/ILL orders was corrected.

V6.10-00, 28–29 January 2017

- For searching in the catalogue, the option of setting up the search fields that are used most frequently has been added. To set up the search fields on the **Field 996/997** tab, set up the search fields by selecting them in the search window of the **Field 996/997** class and save them by clicking the **Save query** button. To set up the search fields on the **Bibliographic record** tab, set up the search fields in the same way in the search window of the **Bibliographic record** class.
- The error in the search window of the **Delivery note** class that occurred when searching by the attribute "Amount due" was corrected.
- The error that occurred when using the **Print confirmation on material return by customer** method was corrected.

V6.8-03, 27 October 2016

- The error that occurred when preparing a delivery note for the loan of a set of home library material that does not belong to the ILL department was corrected.
- The communication error with the local database in COBISS2 when submitting a delivery note for home library material was corrected.

V6.8-00, 4–5 October 2016

- The **Material / Prepare data for statistical reports** method with which you prepare data that is taken into account when preparing and displaying statistical reports for interlibrary loan was updated. Now you can set the start date and time for the job if you wish that the preparation of this data starts at a later time (e.g. outside office hours).
- The list of attributes displayed in the browser when selecting data on the received/delivered material was updated. The following attributes are now also displayed, on the basis of which the amount for the delivered unit of material is calculated (value under "Total Amount"): quantity, unit of measure, price per unit, value before VAT and discount, discount rate, discount, tax base, tax rate and tax amount. The following attributes are also displayed, based on which the additional amount for the delivered unit of material is calculated (value under "Additional amount"): price per unit, value before VAT and discount, discount rate, discount, tax base, tax rate and tax amount.
- In libraries that still use COBISS2/Loan, the list of attributes displayed in the browser when selecting a service from the price list for interlibrary loan was

updated. The following attributes are also displayed: quantity, unit of measure, price per unit, value before VAT and discount, discount rate, discount, tax base, tax rate and tax amount.

- In libraries that use the COBISS3/Loan software module, the list of attributes displayed in the browser when selecting a service from the group **Services/debts – group (ILL)** in the price list was updated. The following attributes are also displayed: username of the librarian who entered the service into the price list (under "Entered by"), the date and time of entry (under "Entered"), the username of the librarian who was the last to modify the data on the selected service (under "Modified by") and the time and date of the modification (under "Modified").