COBISS Lib application

Description of updates in the Loan module

V14.0, 3–4 February 2024

- In COBISS Lib, the option using hotkeys (keyboard shortcuts) was activated for the most commonly used procedures. Hotkeys are used in combination with the <Alt> key, e.g. the key combination <Alt + I> activates the procedure for outside loan.
  The hotkeys can be used for selected procedures that are available:
  - in the COBISS Lib main window (e.g. the key combination <Alt + I> for opening the **Card** window),
  - in the **Member** search window,
  - in the **Card** window (e.g. the key combination <Alt + V> to activate the procedure for returning material).
- In the **Card** window (for the member and department), the new *All material* tab was added which is placed as the first of all the tabs in this window. The tab displays all recorded material with the exception of the material from the *Returned* tab. In libraries with departments the material from the department to which you are logged in is displayed. This tab displays buttons for procedures that are available in the tabs with individual material statuses, and they are active based on the status of the selected material. In case of a library with departments, once you select the option *Material from all departments*, the list of recorded material for all departments is displayed.
- In the **Card** window, the following design changes were made:
  - the content of the member note is displayed in bold in red;
  - the status expiry date is displayed in bold;
  - if the status expiry date has already expired, the date is displayed in red;
  - the number of copies read with RFID is displayed larger.
- In the **Card** window for the library department:
  - the option of selecting the procedures **Lend to reading room** and **Reserve to reading room**;
  - once you record the return of material, you remain in the *Loan* tab;
  - when opening this window, a progress bar for the progress of this procedure was added.
- V COBISS Lib, when performing the procedures **Return, delete** and **Return with restriction** in the **Unavailable material** content set, the member is selected in the list of search results, for which you performed one of the above procedures last.

- In the **Card** window the functionality of renewing the loan period in all departments in which material is recorded for the member was activated. This option is dependent on the activation of a parameter that applies both to COBISS3 and COBISS Lib.
- In COBISS Lib in libraries with departments the operation of the *Material from all departments* option was updated:
  - a progress bar is included so that you can see how long the data loading process will take;
  - once the data loading process is completed, a message is displayed;
  - if there is no material recorded for the member in the other departments, a message is also displayed;
  - when changing the login departments, the display of material from all departments is automatically deselected.
- In the **Card** window, the **Renew**, **Delete reservations and Lend from reading room to outside loan** buttons are only active once at least one copy of material is selected in the list of recorded material.
- In COBISS Lib, the procedure of signing a registration form with the signatory pad was updated with the display of text from the signatory pad.
- In COBISS Lib, integrated use of a POS terminal was enabled. The settings in COBISS DGW must be set up in order for it to work correctly.
- In COBISS Lib, the use of Urbana is enabled.
- In the **Card** window, the **Catalogue** button was renamed to **COBISS+**.
- In the **Material** content set, the **Catalogue** procedure was renamed to **COBISS+**.
- In the **Collection for loan** search window, it is possible to display a catalogue card/slip**.** Select the field 996/997, select the print option from the additional options, and then in the report definition window, select *Slip from catalogue*.
- In libraries with pickup locations the option was added that when returning already reserved material when the material is allocated to the reservation in the reservation queue that meets the allocation criteria, the procedure delivering material to the pickup location is also carried out automatically (when changing the reservation of currently unavailable material (status *R*) to a reservation of available material (status *O*), the reservation gets the status *on its way to pickup location* and the *Lending form for newly received reservations* is printed). This happens in the following cases:
  - the member will collect the material from another location (in another department),
  - the member will not collect the material in the parcel box nor will the material be delivered by post,
  - the returned material will be allocated to interlibrary loan purposes.

  The option is activated upon the library's request with a special parameter.
- In libraries with pickup locations, the **Maximum material pickup cost** as added for the reservation of available material. The data is recorded only on the basis of a preliminary reservation of unavailable material (when changing the reservation of unavailable material (status *R*) to a reservation of available material (status *O* or

W). In COBISS Lib, the maximum material pickup cost is visible in the viewer, and in COBISS3 in the list of attributes that is displayed in the browser and viewer.

- In libraries with pickup locations the **Label of the primary pickup location** was added for the reservation of available or currently unavailable material. For outside loan, reading room loan and interlibrary loan, the **Label for the material pickup location** and **Label of the primary pickup location** were added. The data is only recorded for material on loan in case of a material reservation in advance.
- The duplicate control when entering a new member was updated so that the date of birth is checked also in libraries where the date of birth is not mandatory data.
- In the **Type of non-cash payment** code list the value *21 – FLIK* was added. As of 1 February 2024, online payments with the Flik service will be possible in My library.
- In the **Reports / Standard / Loan / Statistics (user classifications) / Transactions** folder, two new statistics were prepared:
  - *LOAN-STA-T61: By pickup location/transaction type,* which enables the preparation of data on the number of copies of material that were reserved and borrowed by individual pickup locations in a certain time period. The data is displayed by transaction types: *11 – outside loan, 12 – reading room loan, 13 – reserving currently unavailable material, 14 – reserving available material, 25 – reading room reservation, 63 – reserving unavailable material via COBISS+ and mCOBISS* and *64 – reserving available material via COBISS+ and mCOBISS.* The data on loan by pickup locations is displayed only for copies that were reserved in advance.
  - *LOAN-STA-T62: By department/pickup location (pickup location is not in the parent department),* which enables the preparation of data on the realised loan of copies of material that were reserved for collection at a pickup location outside the parent department. For the query parameter **Transaction** the transactions *11 – outside loan* and *12 – reading room loan* are selected by default. The data on loan by pickup locations is displayed only for copies that were reserved in advance.

  NOTE: The data that is the basis for the preparation of new statistics has been recorded in the transaction files since 8 December 2023 when version V13.1 was installed.

- Bug fixes:
  - for a reservation of unavailable material via COBISS+, if the member selected a pickup location, to which the material will be delivered from another location (applicable to libraries with departments and pickup locations that charge a material pickup cost at another location);
  - for the return of previously reserved material that is available for loan under certain conditions and is on reading room loan (applicable to libraries with pickup locations);
  - when returning previously reserved material is the material is not allocated to any reservation in the reservation queue (applicable to libraries with pickup locations);

- when displacing cancelled reservations in the **List of reservations and reservation cancellations of available material** window;
- for online payment of debt with a discount;
- when selecting price list items when creating a new list of discounts;
- when preparing a loan analysis in libraries without departments;
- when de-accessioning lost material in another department;
- when entering member with a selection from the students reference database;
- in COBISS Lib when entering the date of the last visit and the number of visits per year for a member;
- in COBISS Lib when opening the code lists for **School name** and **School department/year** based on the selected school type in the **Schooling, employment** tab in the **Member** editor**;**
- in COBISS Lib when using saved queries in the **Unavailable material** search window;
- in COBISS Lib when changing a member's membership card number in the **Card** window;
- in COBISS Lib when entering the activation time for a procedure/report;
- in COBISS Lib for the procedure **Price list/Show lists of discounts**;
- in COBISS Lib for **Transaction department** when viewing the material from all departments;
- in COBISS Lib when displaying the number of days overdue in red, if the late fee will be calculated for a different number of days because of the settings;
- in COBISS Lib when sending a lending note by e-mail – a message was added;
- in COBISS Lib when sending a report to the printer if the printing is unsuccessful (e.g. the user does not have DGW installed);
- in COBISS Lib when batch deleting inactive members in case of a large number of members that meet the criteria for deletion.

V13.1, 8 December 2023

- The option was added to select the e-mail address, to which e-overdue notices for individual member categories can be sent (e.g. e-overdue notice for preschool and primary school children are sent to the guardian's e-mail address). The option is activated upon the library's request with a special parameter.
- In libraries with pickup locations, recording loan transactions was updated with the following data:
  - **Label of the primary pickup location** and **Collection from the department of the primary material pickup location**. The data is recorded for the transaction types *11, 12, 14, 15, 25, 36, 37, 38, 40, 41, 42, 64, 65* and *67*. For the transaction types *11, 12* and *25,* the data is only recorded if the loan was recorded based on a previous material reservation.
  - **Label for the material pickup location** for the transaction types *11, 12, 25* and *41*.

The data is only recorded if the loan was recorded based on a previous material reservation.
- **Returned in another department** for the transaction types *17* and *18* (for copies with the status *C – outside loan* and *S – reading room loan*).

The new data has been recorded in the transaction files since the installation of version V13.1. Data will not be added retrospectively.

Use of new data:
- when preparing new statistics *LOAN-STA-T61: By pickup location/transaction type* and *LOAN-STA-T62: By department/pickup location (pickup location is not in the parent department)*,
- when using the data export tool for exporting transaction data.

- Bug fix when saving report parameters when preparing statistics.

V13.0.12, 2 December 2023
- Bug fix when displaying results in the **Transactions** search window.

V13.0.10, 16 November 2023
- A reservation with the status *in process* can now be closed by any user.
- Bug fixes:
    - when reserving material via COBISS+ from the **Reservation** tab;
    - when returning material with RFID in a department other than the one it was borrowed from;
    - when setting business restrictions.

V13.0.9, 14 November 2023
- Bug fix:
    - when processing a reservation and loan with material collection from the parcel boxes *Direct4me*; in case of conditional loan restrictions (restrictions for the member or for the material that require confirmation by the librarian when the material is put on loan), these restrictions are not taken into account when the material is placed into the parcel box or is collected from the parcel box (applicable to libraries with pickup locations).

V13.0.8, 11 November 2023
- In libraries with pickup locations that enable material collection from the parcel boxes *Direct4me*, an option for reserving a parcel box for the return of material was added in COBISS+. The option is activated upon the library's request with a special parameter. If the parameter is activated, the member with the borrowed material can click the **Return to parcel box** button in My library and reserve a parcel box for returning the material.
- Bug fixes:

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–   when setting up and removing material protection in libraries that use RFID technology;
–   for cash register transaction *9 – debts settlement cancellation*;
–   when returning material in the host department if there is a reservation in the parent department;
–   in the process of generating member data for the Slovenian National and University Library (NUK);
–   in COBISS Lib when printing overdue notices on a printer – a superfluous message was removed.

V13.0.7, 26 October 2023

- In COBISS Lib in the content set **Pickup location** and in the pickup locations search window, the option of adding a new pickup location was removed.
- Bug fixes:
    –   when lending serials with the status *W*;
    –   when returning material with a restriction in the host depatment if there is a reservation for this material;
    –   in COBISS Lib in the member card, changing the pickup location for a reservation for ILL was disabled (applicable to libraries with pickup locations).
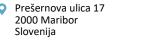
V13.0.6, 16 October 2023

- Bug fix for lending material with the status W (applicable to libraries without pickup locations).

V13.0.5, 12 October 2023

- In version V13.0.5, we made changes to processing reservations of unavailable material that are applicable to libraries with pickup locations. When material that is already reserved is returned in libraries with departments, a common reservation queue for all departments is checked, in which reservations are sorted in ascending order by reservation date (the oldest reservation is at the top). The returned material is then (regardless of the return department) allocated to the first reservation from the reservation queue that is entered in the parent department that meets the criteria for material collection (the pickup location and the maximum material pickup cost are checked). If there are no reservations for the returned material in the parent department, then the material is allocated to the first reservation from the reservation queue that meets the criteria for material collection. For reservations for interlibrary loan, the conditions are not checked. In libraries without departments, the material is allocated to the first reservation from the reservation queue that meets the criteria for material collection.
- A software control was added. In libraries with pickup locations it is not possible to switch directly from status *O* to status *C*, if the material will not be picked up in the

department for which the reservation is recorded. Before you lend the material, it must be prepared for collection at the pickup location.

- In libraries with pickup locations, the **Maximum material pickup cost** as added. The data is recorded based on a reservation of unavailable material made. In COBISS Lib, the maximum material pickup cost is visible in the viewer, and in COBISS3 in the list of attributes that is displayed in the browser and viewer. If for the selected reservation the maximum material pickup cost is *0.00 EUR* or there is no value, then the debt for material collection will not be recorded for the member when preparing material for collection.

- Bug fixes:
    - when processing reservations of unavailable material (applicable to libraries with departments and pickup locations that charge a material pickup cost at another location):
        - when returning material on interdepartmental loan at the host department: the material is reserved in the host department and will be picked up at the host department or another department, there are no reservations for this material in the parent department;
        - when returning material on interdepartmental loan at another department: the material is reserved in the host department and will be picked up there;
        - when returning material on interdepartmental loan at another department: the material is reserved in the department where it was returned and will also be picked up there.
    - when reserving unavailable material via COBISS+ (from the **Reservation** tab), if the material is on interdepartmental loan (applicable to libraries with pickup locations);
    - when displaying the information on the material pickup cost in COBISS+ for material that is recorded as retained in another department (applicable to libraries with pickup locations that charge a material pickup cost at another location);
    - when reserving unavailable material via COBISS+ (from the **Reservation** tab), if the member selected a pickup location in a department that does not have its own holdings for loan, but it is possible to collect material from other departments there, or if he selected a pickup location in a department that only had one copy for loan, but that copy is currently recorded as retained in another department (applicable to libraries with pickup locations);
    - when putting reading room material on outside loan (applicable to libraries without departments and with pickup locations);
    - when editing member notes when refreshing the buttons in the **Note** window;
    - when opening the **Set** window in the procedure for quick material return;
    - for the **Copy to prepared list of discounts** method in libraries where the COBISS-SAP link is activated.

V13.0.3, 2 October 2023

- Bug fixes:
  - when returning already reserved material (applicable to libraries without departments and with pickup locations);
  - when lending a copy that is reserved for another member, if the record also contains another set of material that is available for loan;
  - when returning material on interdepartmental loan with a restriction in the parent department if it is reserved there;
  - in the *LOAN-BibSiSt-01: Library members* report, deleted members are not taken into account;
  - when settling debts in libraries without a tax register;
  - when setting and removing the designation that the material is placed in the mobile library in the process of preparing material for collection.

V13.0.2, 26 September 2023

- Bug fixes:
  - in COBISS Lib for the list of report definitions when you select the printing of selected data in the **Unavailable material** search window;
  - when cancelling the procedure of settling a debt for a non-member.

V13.0.1, 21 September 2023

- The **Card** window also opens if the material entered for the member is in such physical form for which an icon is not defined.
- Bug fix when reserving currently unavailable material (applicable to libraries with departments and pickup locations).