



*COBISS Lib  
Instructions –  
selected procedures*



United Nations  
Educational, Scientific and  
Cultural Organization

Regional Centre for  
Library Information Systems and  
Current Research Information Systems  
Regionalni center za knjižnične  
informatijske sisteme in informatijske  
sisteme o raziskovalni dejavnosti



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**The document was created at the initiative of the school library working group. It is a short written instructions for COBISS Lib for basic procedures that are performed in libraries on a daily or very frequent basis, as reported by the work group.**

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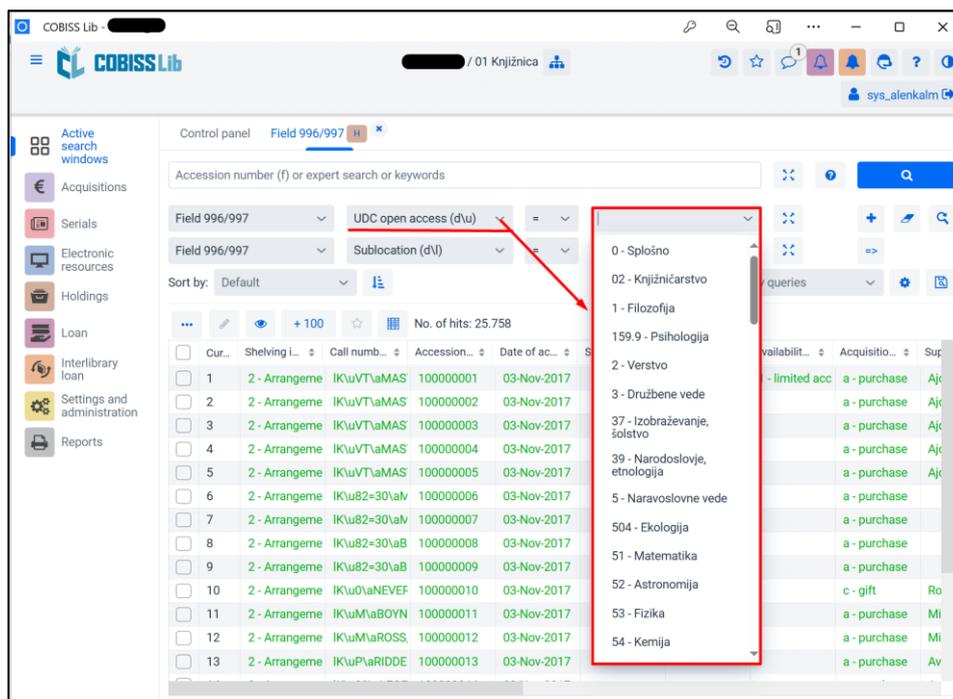
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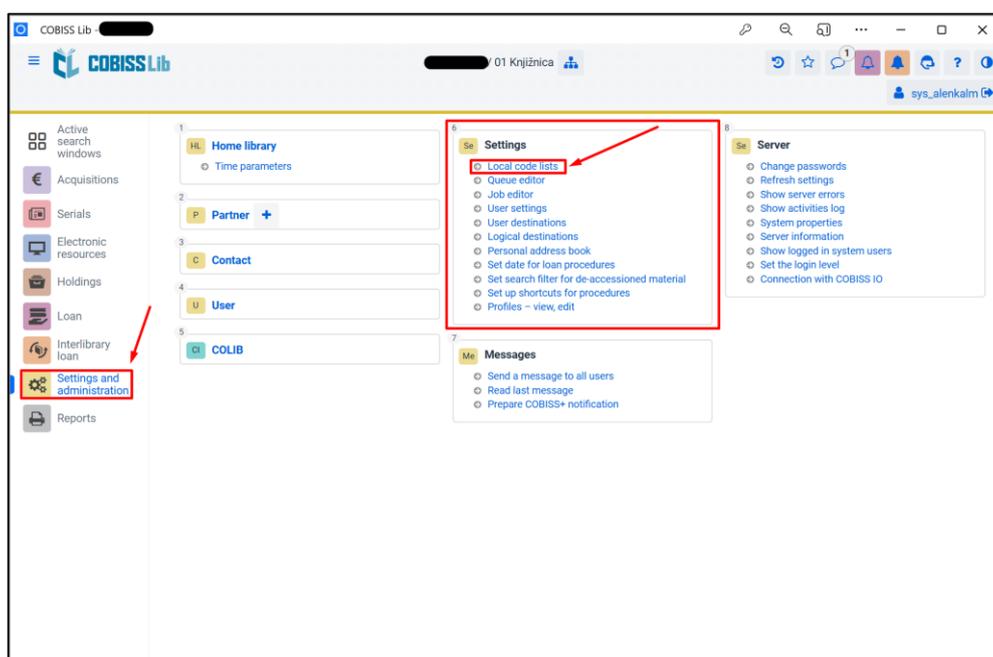
# 1 COBISS Lib application

## 1.1 Local code lists – finding, changing and adding data

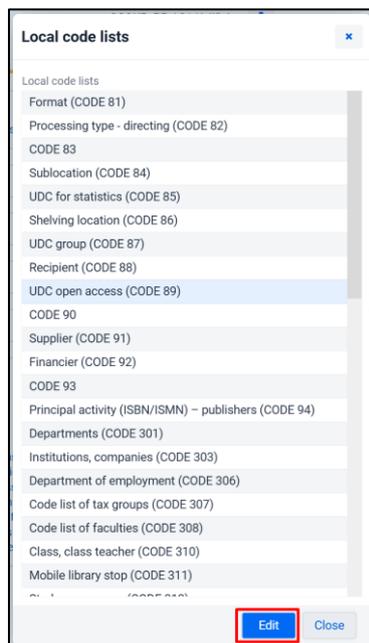
The content of code lists can be quickly checked within search windows in drop-down lists.



You can edit them in the **Settings and administration** module in the **Settings** content set using the **Local code lists** procedure.

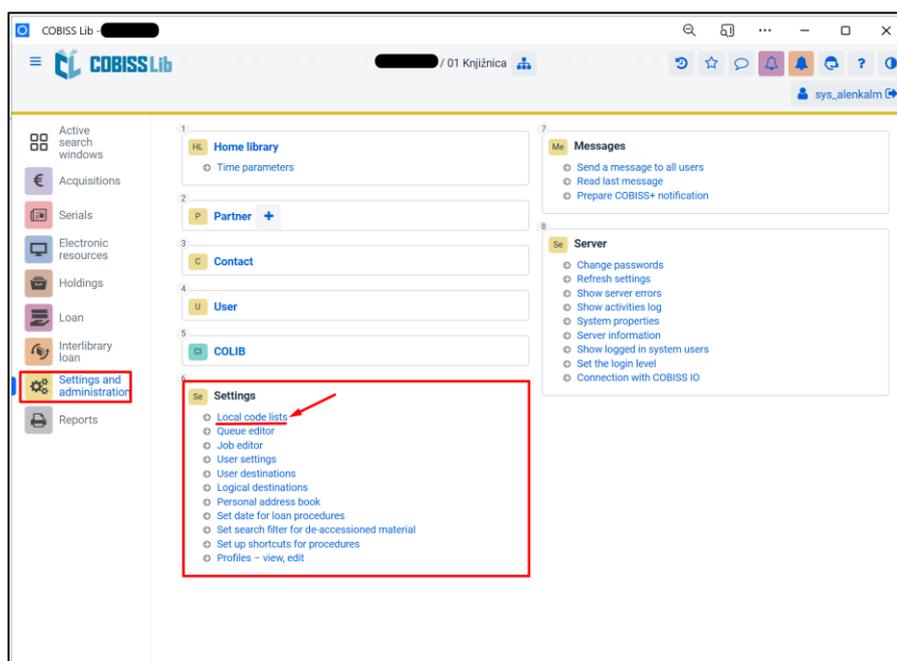


The content of the procedure for changing the content of local code lists is unchanged, and the subsequent steps are the same as in COBISS3.



## 1.2 Adding a new school department and changing data

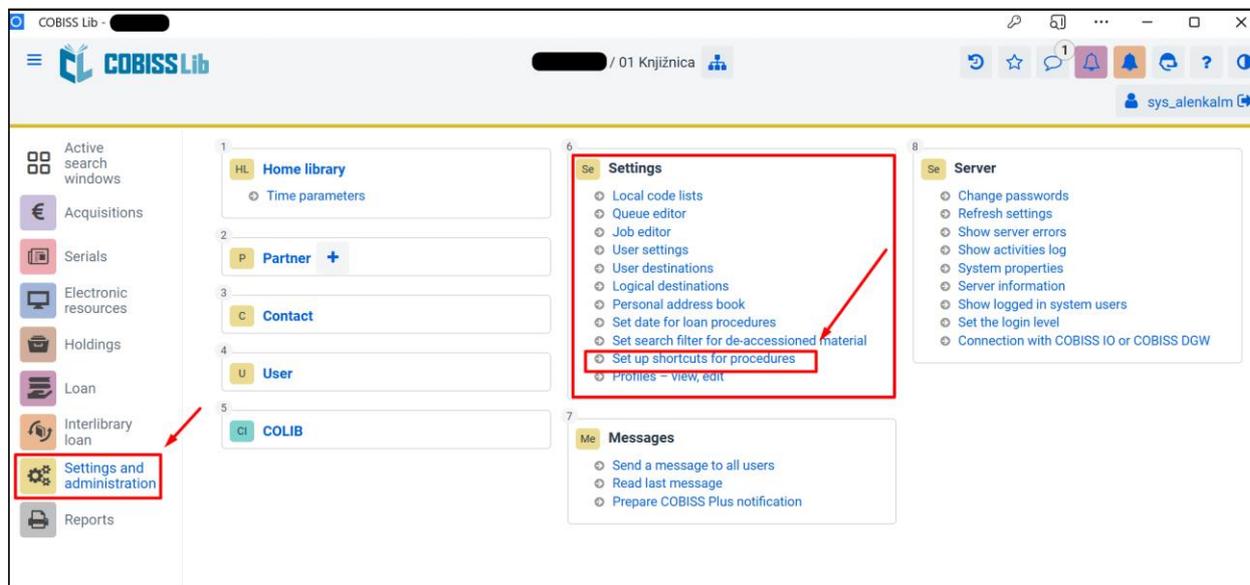
A new school department (class/grade) is added in the local code list **Class, class teacher (CODE 310)**. **Local code lists** are accessible in the **Settings and administration** module in the **Settings** content set.



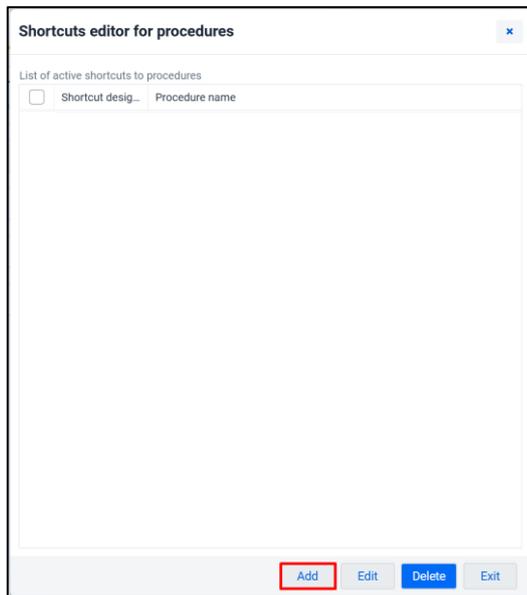
The subsequent steps for entering a new code are the same in content as in COBISS3.

## 1.3 Creating shortcuts

Shortcuts are set up and edited in the **Settings and administration** module in the **Settings** content set using the **Setting shortcuts for performing procedures** procedure.



In the window that opens, use the **Add** button.



Then select the procedure for which you want to add a shortcut button and enter the **Shortcut label**.

**Edit procedure**

Procedure name  
Unavailable material / Return/Delete

Procedure label  
RET

List of procedures

- Material / Download record from COBIB
- Material / Catalogue
- Member / Card
- Member / Enter visit
- Field 996/997 / View
- Unavailable material / Return/Delete
- Unavailable material / Return with restriction
- Reservation processing location / Monitoring and processing reservations of available material
- Department / Transition to another department
- Invoice / Settle debt for non-member
- Cash register balance / Open the cash register drawer
- Unavailable equipment / Return/Delete

OK Cancel

The new shortcut is added to the list of active shortcuts and can be used in the COBISS Lib main window.

**Shortcuts editor for procedures**

List of active shortcuts to procedures

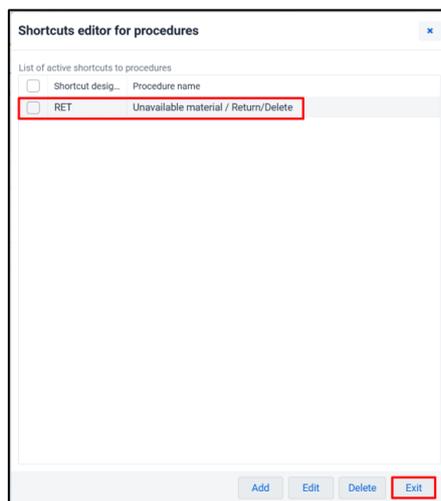
Shortcut desig...	Procedure name
<input type="checkbox"/> RET	Unavailable material / Return/Delete

Add Edit Delete Exit

Instructions for setting up shortcut buttons: [4.1 Setting shortcuts for performing procedures.](#)

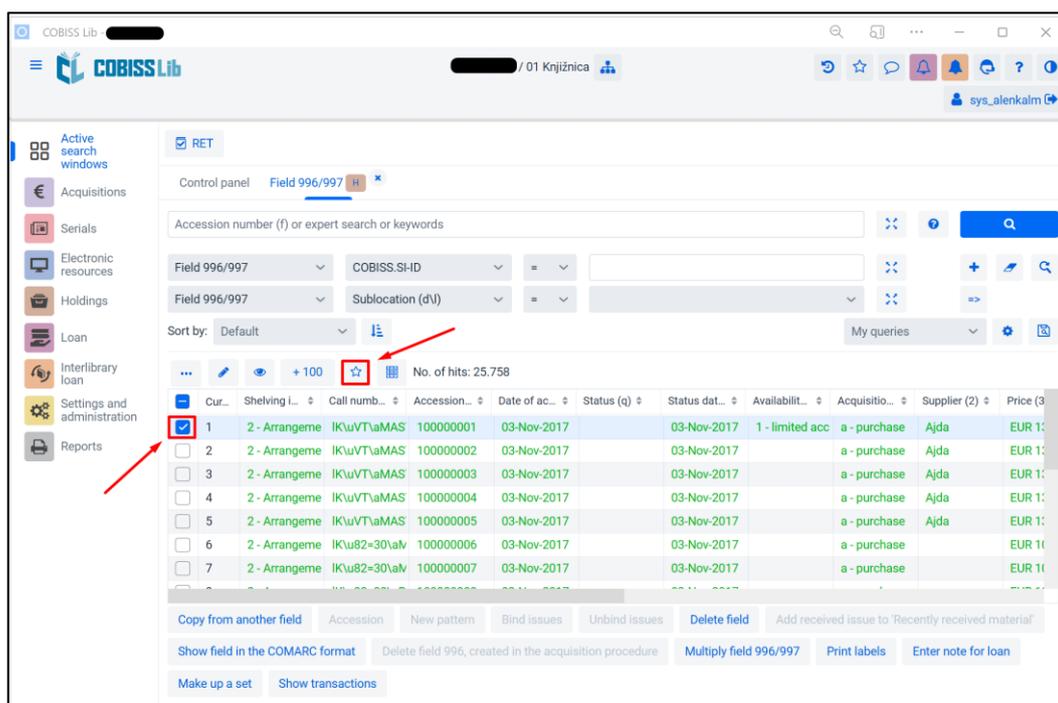
## 1.4 Meaning of shortcut buttons abbreviations

Each librarian determines the abbreviations to be used for the shortcut buttons. You can check which abbreviation is used for a particular procedure in the shortcuts editor for procedures (described in the previous section).



## 1.5 Creating shortcuts

A shortcut is created by selecting the desired search result in the search window and performing the **Add to Shortcuts** procedure (star icon) This new shortcut is then accessible in the Shortcuts viewer (star icon in the top right).





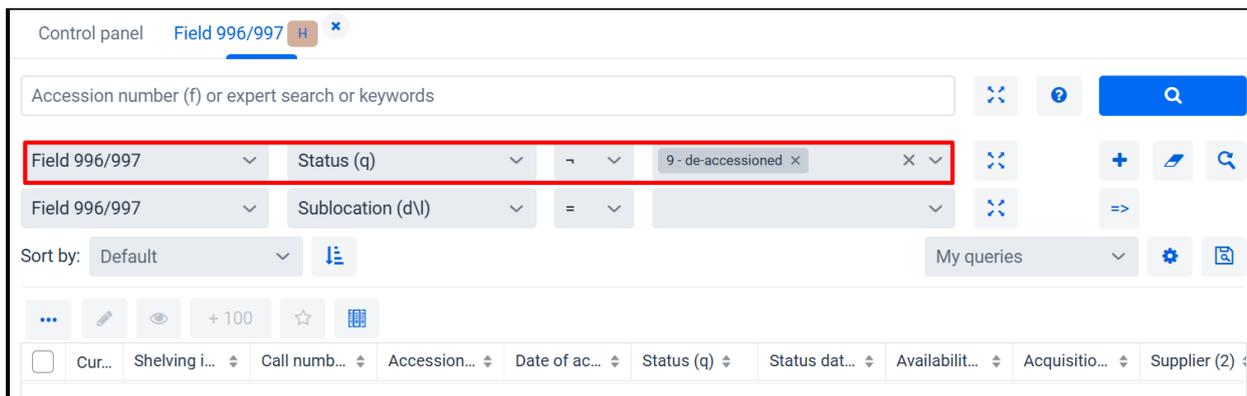
The new query is then accessible in the drop-down list of saved queries for that search window.

## 1.7 Control panel

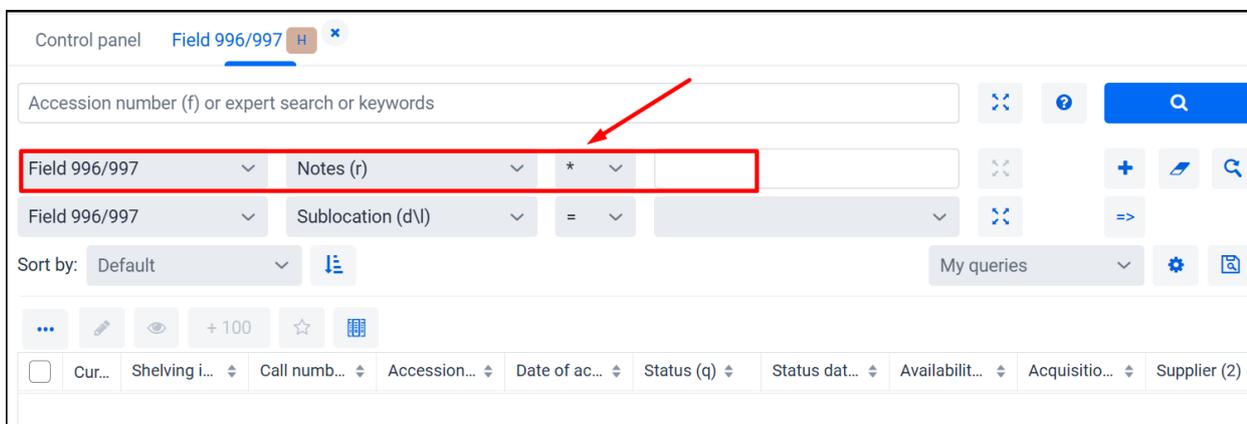
The control panel is the start window of the COBISS Lib program. It currently displays certain data about the contents of the database. It is intended for a quick review of the status of your database, as the data is only updated once a day.

## 1.8 Meaning of the characters: = ¬ \* Ø

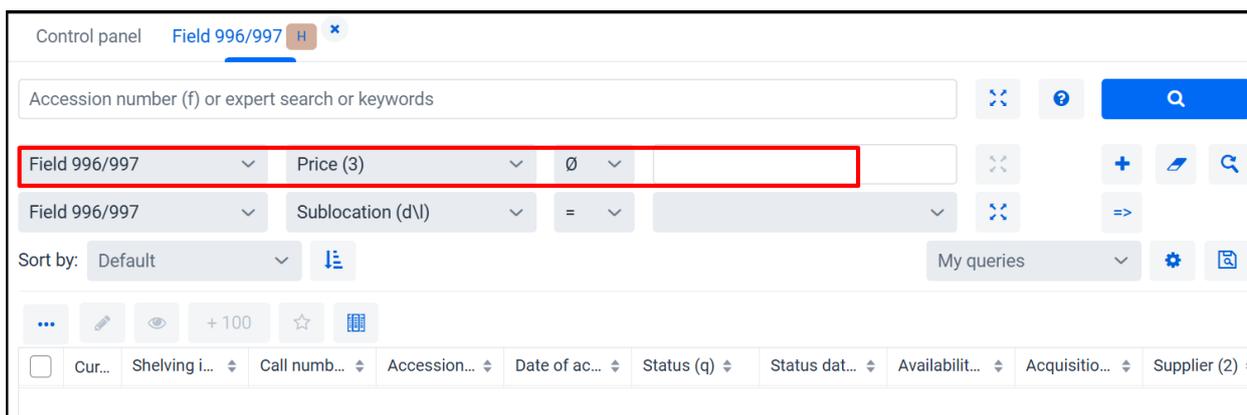
= → Not an operator. This is the default search by the attribute value entered in the search window.  
 ¬ → Operator **NOT**. You enter the value for the search attribute that you want to exclude from the search. An example of using this operator is when you want to exclude all de-acquisitioned material from the search.



\* → Operator **NOTEMPTY**. You enter a value for a search attribute when you want to include all fields with any value entered for that attribute. An example of using this operator is searching for an entered note. When searching this way, the attribute value is not entered.



∅ → Operator **EMPTY**. You enter the value for the search attribute when you want all results that have this attribute empty. An example of using this operator is when searching for fields 996/997 without a price entered. When searching this way, the attribute value is not entered.



## 2 COBISS Lib/Holdings

### 2.1 Searching for material in the COBISS system, downloading to the local database and entering holdings

The procedure is unchanged in content compared to COBISS3.

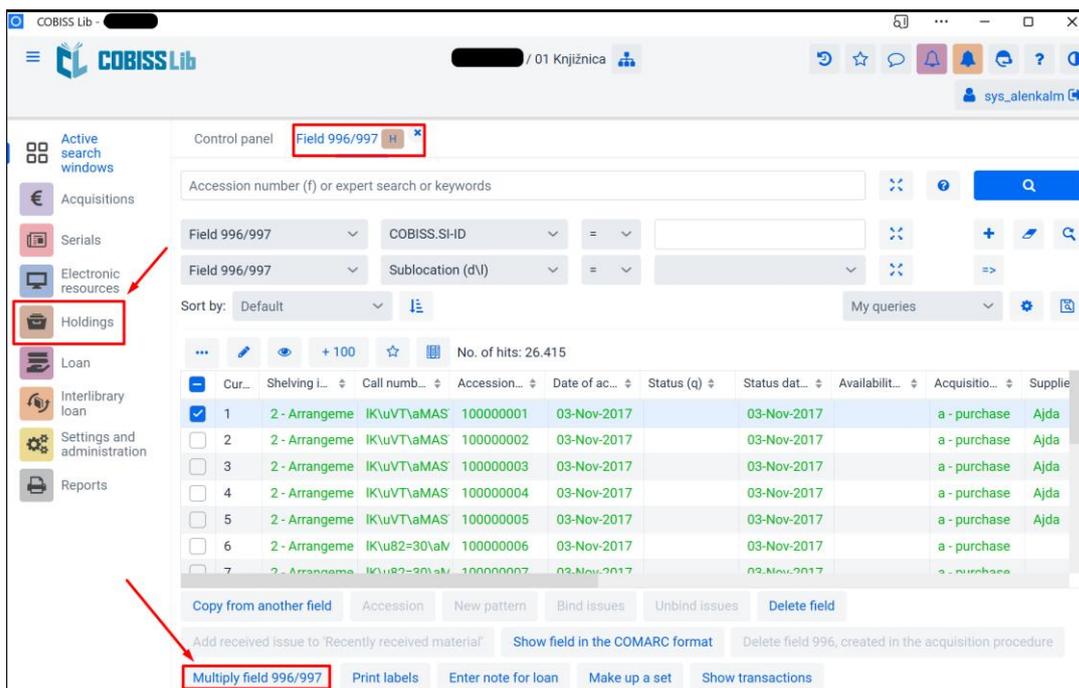
### 2.2 Entering invoice information and changing acquisition data

You enter invoice information in the **Field 996/997** editor with the **Acquisition data** button.

The procedure of entering invoice data itself remains unchanged in subsequent steps compared to COBISS3.

### 2.3 Procedure Multiply field 996/997

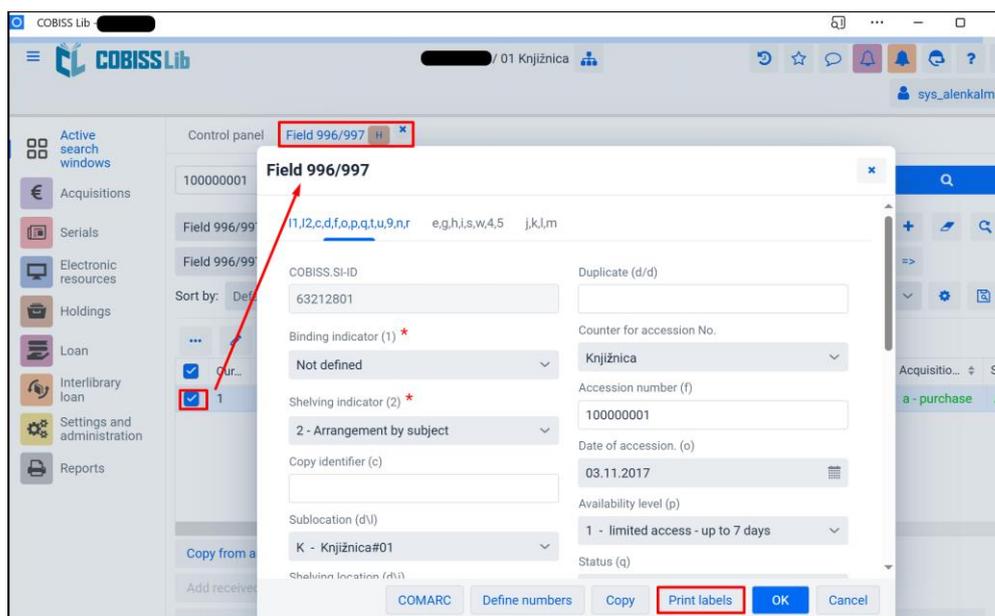
The procedure is available in the **Holdings** module in the **Field 996/997** search window.

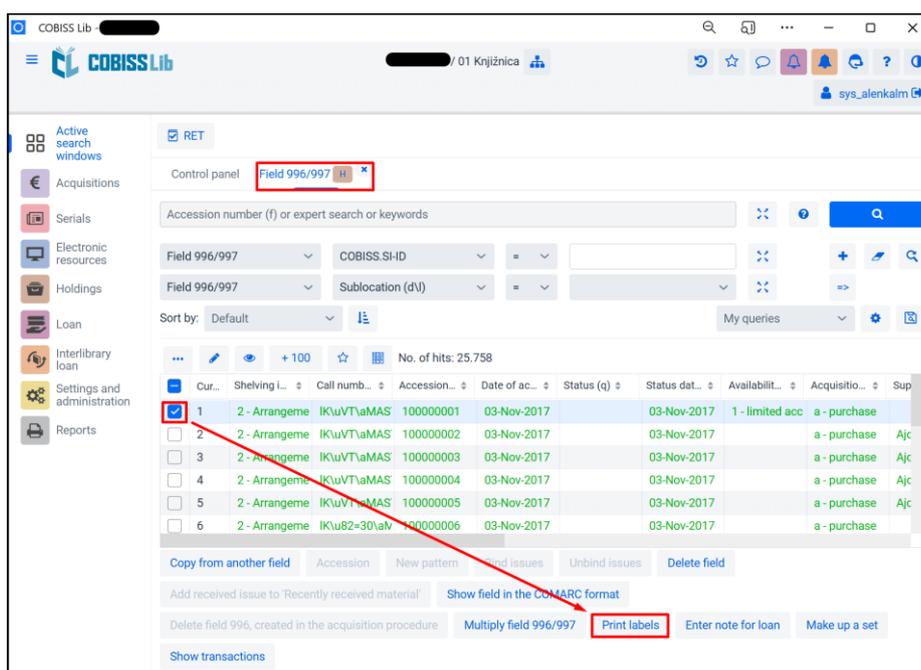


The content of the procedure is unchanged, and the subsequent steps are the same as in COBISS3.

## 2.4 Label printing for fields 996/997

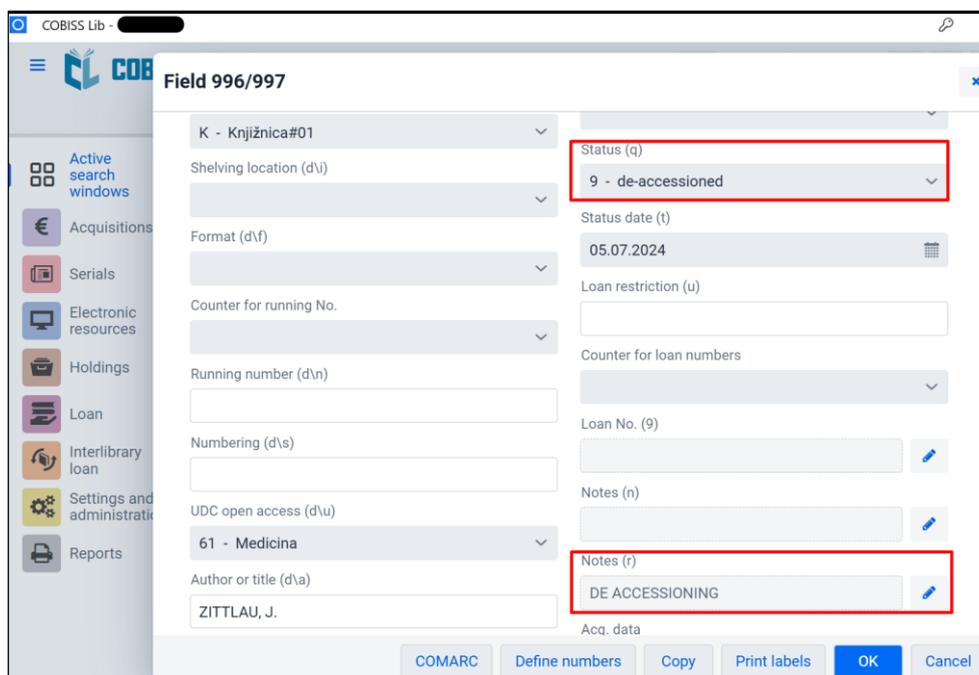
To print labels from COBISS Lib, the **COBISS DGW service** must be installed on the local computer. A IT technician will help you with this. A document with instructions is available on our website: [Installing the COBISS IO application](#). Once the service is installed and the logical destinations are properly organized, you can print labels directly from the **Field 996/997 editor** or from the **Field 996/997 search window**.



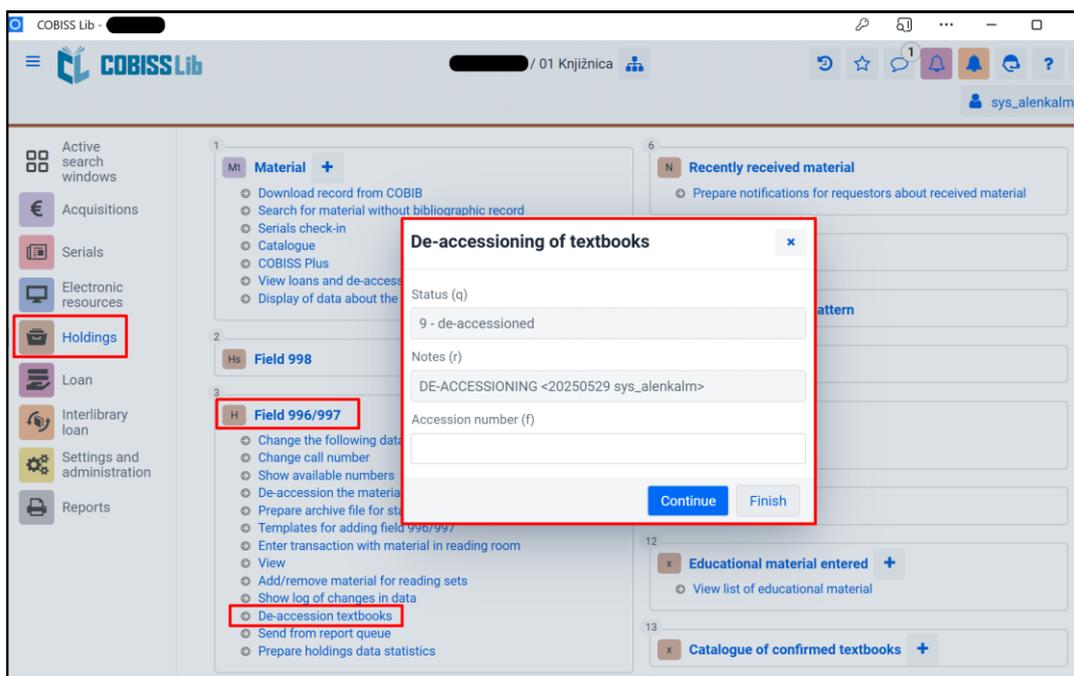


## 2.5 De-accessioning material

Field 996/997 is de-accessioned in the editor by entering status **9 – de-accessioned** and notes **(r)**.

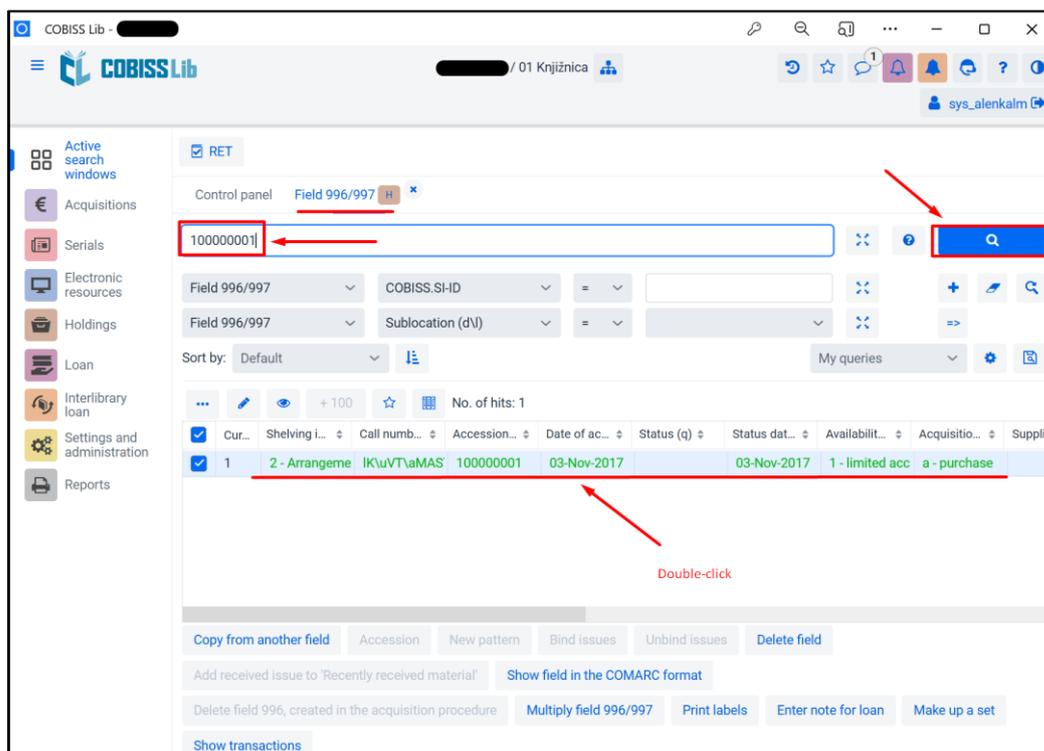


To quickly de-accession a larger number of fields, you can use the **De-accession textbooks** procedure in the **Field 996/997** content set. In this procedure, the system note **DE-ACCESSIONING** and the status **9 – de-accessioned** are entered, and the accession numbers for de-accessioning are simply read.



## 2.6 Searching for the field 996/997 and changing data

There is no **Search by key** procedure in COBISS Lib. The fastest way to find the field 996/997 is to enter the accession number in the search bar. The quickest way to open the field editor is to double-click anywhere in the row of the found field (the row does not need to be highlighted or selected beforehand).



## 2.7 Number of fields 996/997 in the library for each title

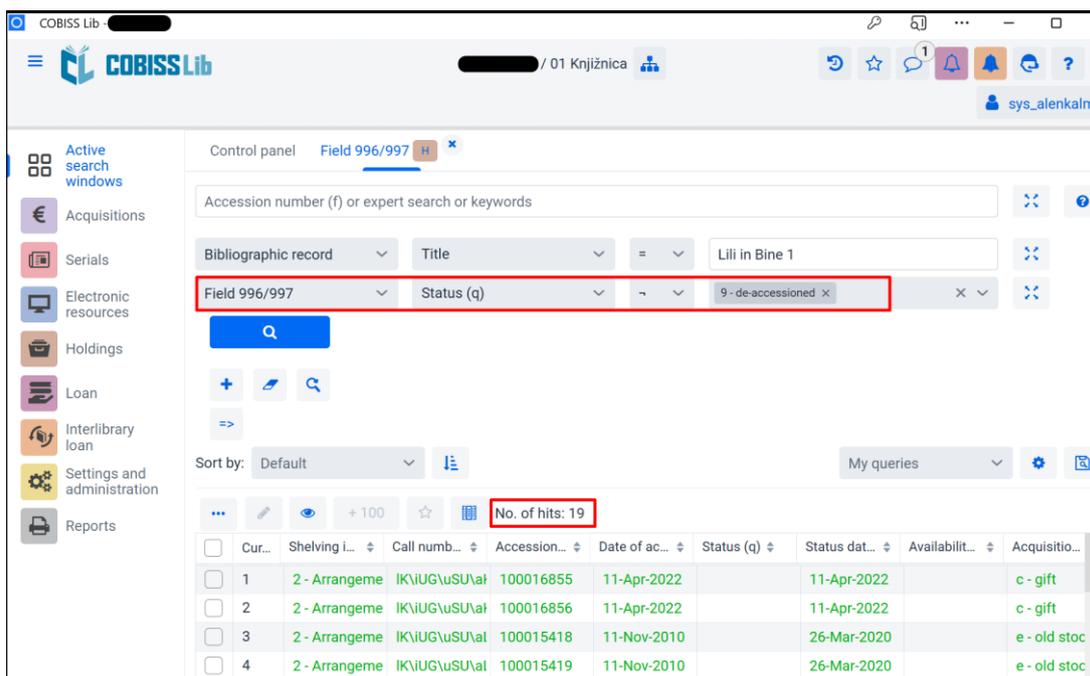
The fastest way to check the number of all fields 996/997 in your database is to use the **Field 996/997** search window. In one of the search rows, select the value **Bibliographic record** in the first drop-down list and **Title** in the second drop-down list and, after entering the desired title, perform the search. The search result is the number of units for this title (for all editions) in your library.

The screenshot shows the COBISS Lib search interface. The 'Control panel' is set to 'Field 996/997'. The search criteria are 'Bibliographic record' and 'Title'. A red box highlights the search criteria, and a red arrow points to the 'Bibliographic record' dropdown.

The screenshot shows the COBISS Lib search interface with search results. The search criteria are 'Bibliographic record' and 'Title' with the search term 'Lili in Bine 1'. The search results table shows 23 hits. A red box highlights the search term, and a red arrow points to the search button.

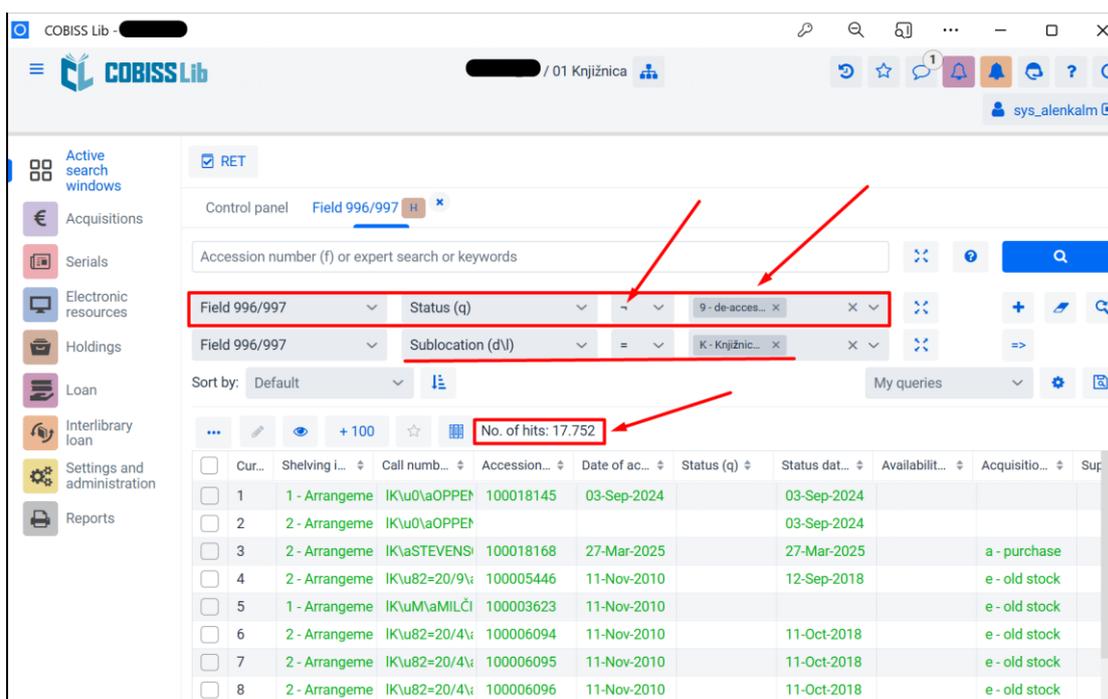
Cur...	Shelving i...	Call numb...	Accession...	Date of ac...	Status (q)	Status dat...	Availabilit...	Acquisitio...	St
1	2 - Arrangeme	IK\UG\uSU\al	100016855	11-Apr-2022		11-Apr-2022		c - gift	R
2	2 - Arrangeme	IK\UG\uSU\al	100016856	11-Apr-2022		11-Apr-2022		c - gift	R
3	2 - Arrangeme	IK\UG\uSU\al	100015418	11-Nov-2010		26-Mar-2020		e - old stock	
4	2 - Arrangeme	IK\UG\uSU\al	100015419	11-Nov-2010		26-Mar-2020		e - old stock	
5	2 - Arrangeme	IK\UG\uSU\al	100003993	11-Nov-2010		02-Jul-2018		e - old stock	
6	2 - Arrangeme	IK\UG\uSU\al	100015432	11-Nov-2010		26-Mar-2020		e - old stock	
7	2 - Arrangeme	IK\UG\uSU\al	100015433	11-Nov-2010		26-Mar-2020		e - old stock	
8	2 - Arrangeme	IK\UG\uSU\al	100004870	11-Nov-2010		29-Aug-2018		e - old stock	
9	2 - Arrangeme	IK\UG\uSU\al	100015221	11-Nov-2010		20-Mar-2020		e - old stock	

If you want to exclude de-accessioned fields from the search, you use an advanced query.



## 2.8 Number of fields 996/997 in the local database (active units):

The fastest and easiest way to check the number of fields in the local database is in the **Field 996/997** search window. **Status (q) 9 – de-accessioned** must be excluded and, if necessary, the search must be limited to sublocations (you exclude textbook fund material).

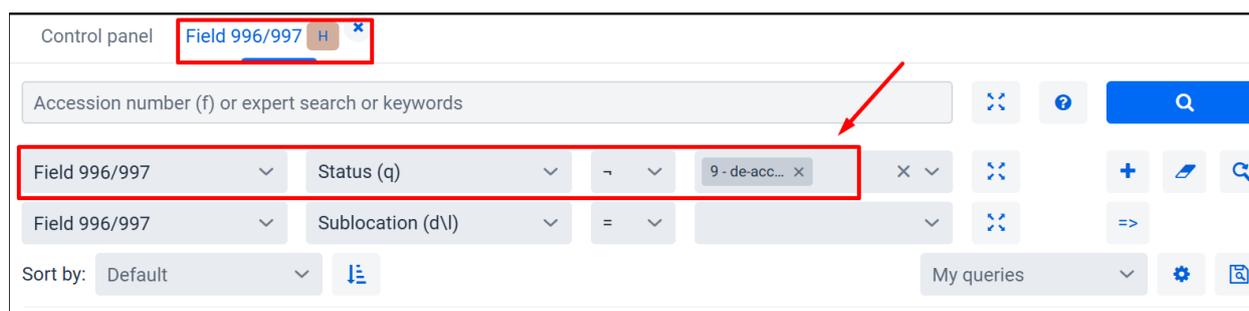
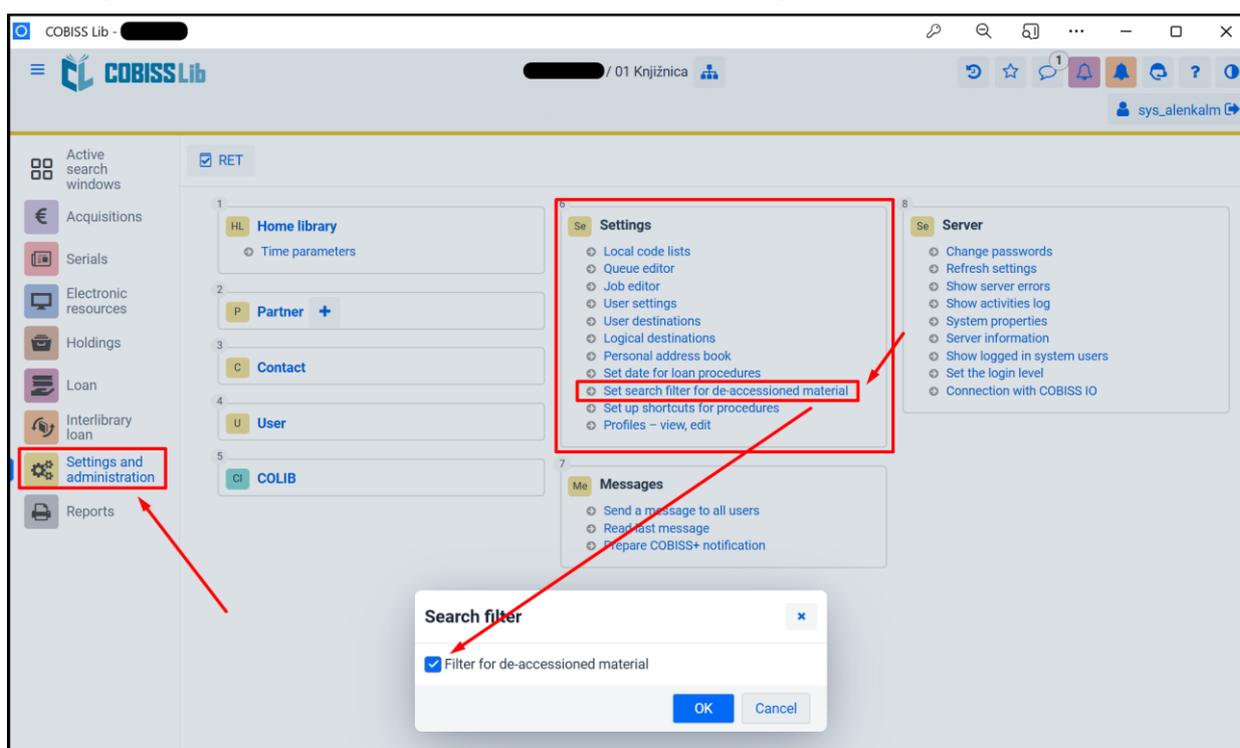


## 2.9 Search for fields 996/997 of a specific location or library unit

All search windows work by searching the entire database for results that match the entered search query. If you want to limit this, you use the appropriate search attributes. Limit the search for fields 996/997 to only a specific location using the **Sublocation (d\l)** attribute.

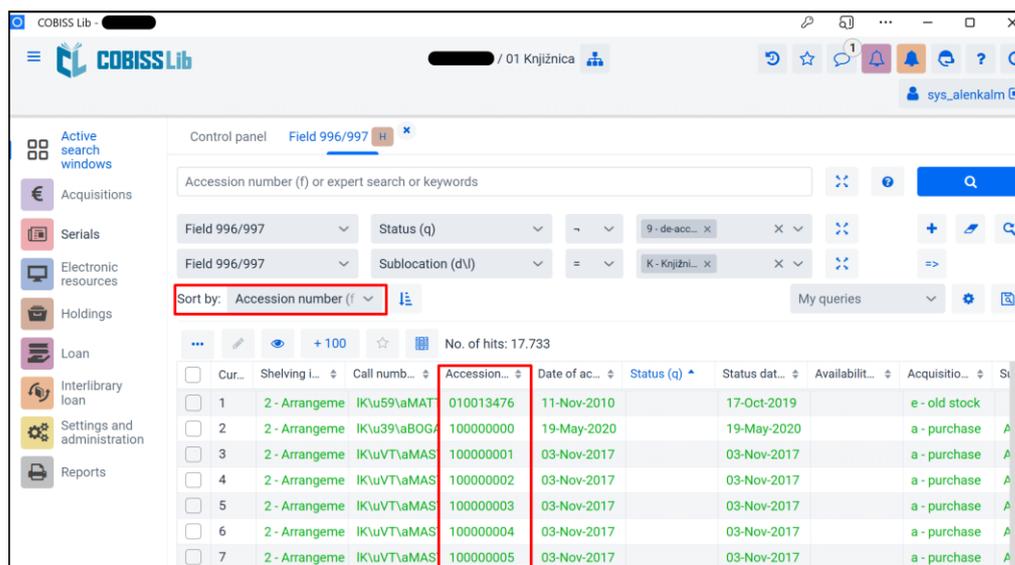
## 2.10 Default holdings search without de-accessioned fields

If you do not want de-accessioned fields 996/997 to appear in the search results in the search window, you can set a **search filter for de-accessioned material**. This will mean that the **Material** and **Field 996/997** search windows will be marked by default to exclude de-accessioned material from the search. The filter is set in the **Settings and administration** module in the **Settings** content set using the **Set search filter for de-accessioned material** procedure.



## 2.11 Sorting search results by accession number

If you want to sort by a specific attribute in the search window, specify this with **Sort** before performing the search. The search results will then be displayed in order according to the selected attribute. By default, it is sorted from smallest to largest value, but this can also be adjusted using the button (to the right of the selected attribute).



Control panel Field 996/997

Accession number (f) or expert search or keywords

Field 996/997 Status (q) 9 - de-acc... x

Field 996/997 Sublocation (dvl) K - Knjižni... x =>

Sort by: Accession number (f) i

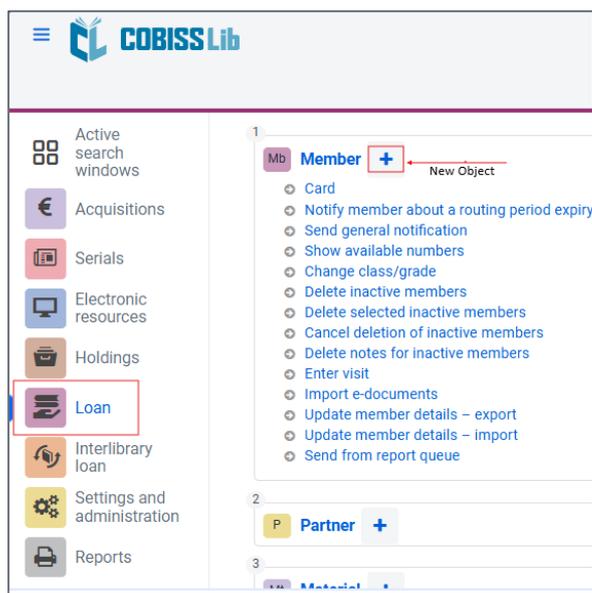
No. of hits: 17.733

Cur...	Shelving l...	Call numb...	Accession...	Date of ac...	Status (q)	Status dat...	Availabilit...	Acquisitio...	St
1	2 - Arrangeme	IKu59\amAT	010013476	11-Nov-2010		17-Oct-2019		e - old stock	
2	2 - Arrangeme	IKu39\amBOGA	100000000	19-May-2020		19-May-2020		a - purchase	A
3	2 - Arrangeme	IKuVT\amMAS	100000001	03-Nov-2017		03-Nov-2017		a - purchase	A
4	2 - Arrangeme	IKuVT\amMAS	100000002	03-Nov-2017		03-Nov-2017		a - purchase	A
5	2 - Arrangeme	IKuVT\amMAS	100000003	03-Nov-2017		03-Nov-2017		a - purchase	A
6	2 - Arrangeme	IKuVT\amMAS	100000004	03-Nov-2017		03-Nov-2017		a - purchase	A
7	2 - Arrangeme	IKuVT\amMAS	100000005	03-Nov-2017		03-Nov-2017		a - purchase	A

## 3 COBISS Lib/Loan

### 3.1 New member registration

A new member is added in the **Member** content set using the **New Object** procedure (plus icon)



COBISS Lib

Active search windows

Acquisitions

Serials

Electronic resources

Holdings

Loan

Interlibrary loan

Settings and administration

Reports

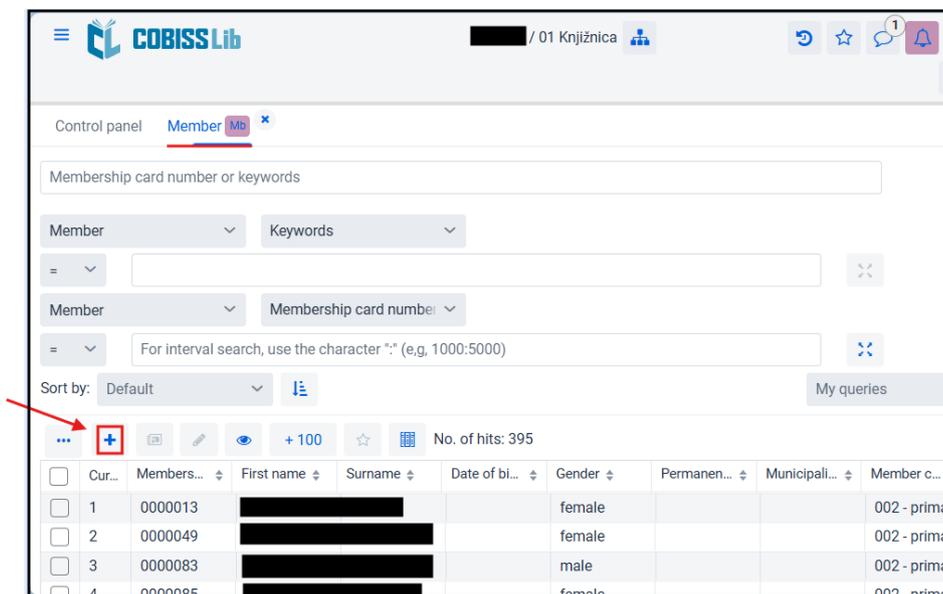
1 Mb Member + New Object

- Card
- Notify member about a routing period expiry
- Send general notification
- Show available numbers
- Change class/grade
- Delete inactive members
- Delete selected inactive members
- Cancel deletion of inactive members
- Delete notes for inactive members
- Enter visit
- Import e-documents
- Update member details – export
- Update member details – import
- Send from report queue

2 P Partner +

3 Material +

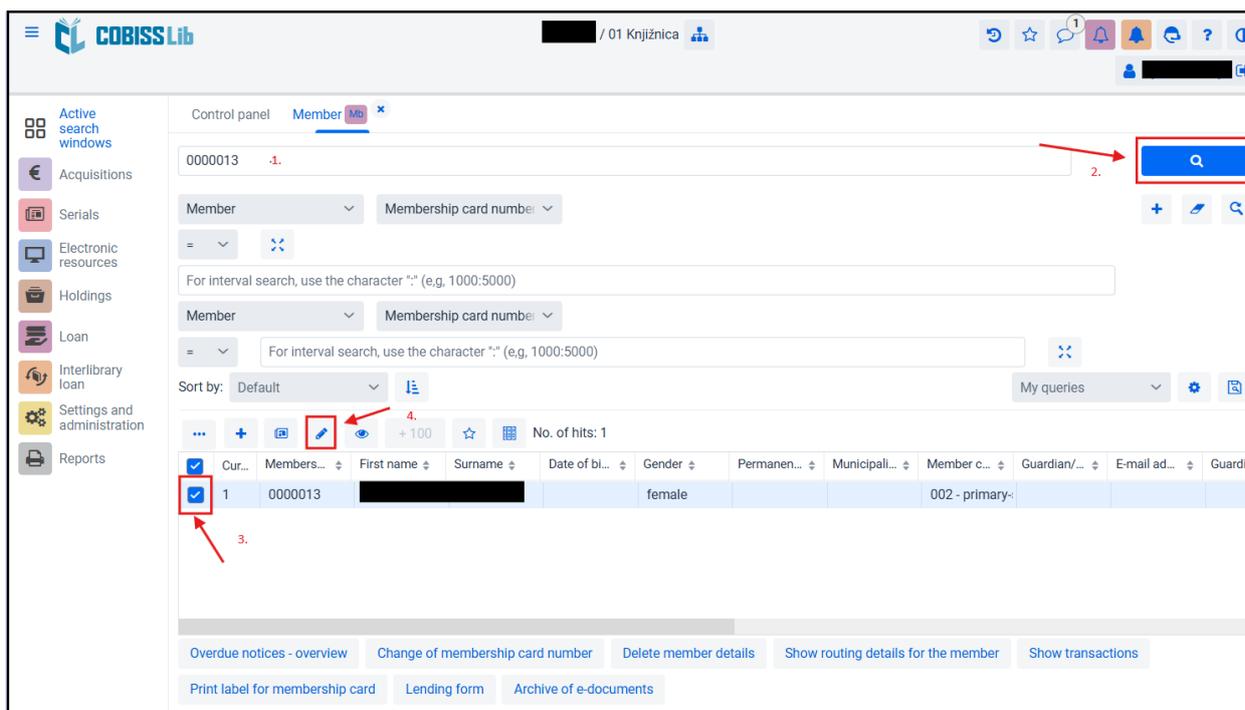
or within the **Member** search window with the same button (open the search window by clicking on **Member** in the image above).



The editor that opens is identical in content to the one in COBISS3.

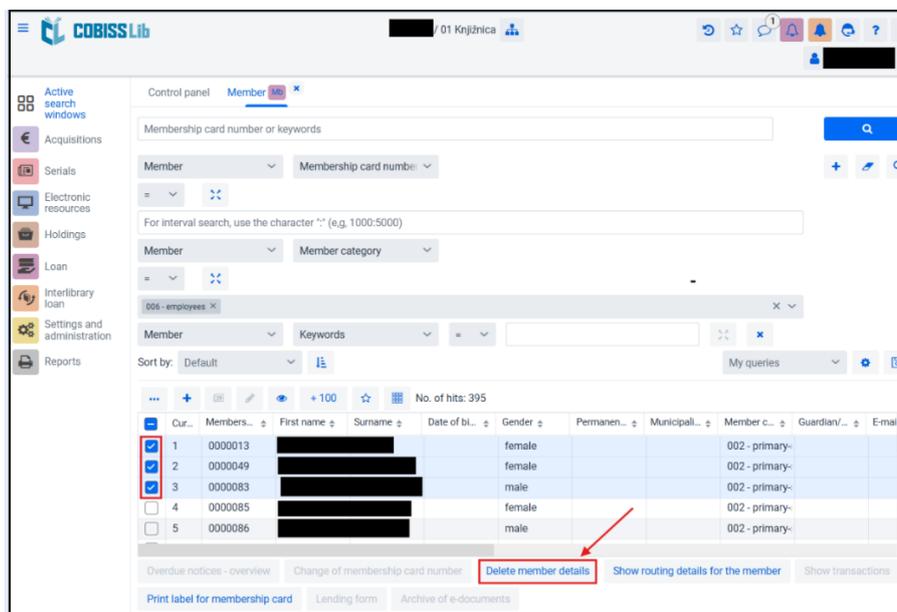
### 3.2 Changing member data

You search for and select the member in the search window. Open the editor by clicking on the pen icon or double-clicking. The editor is identical in content to the one in COBISS3 and data is changed in the same way.



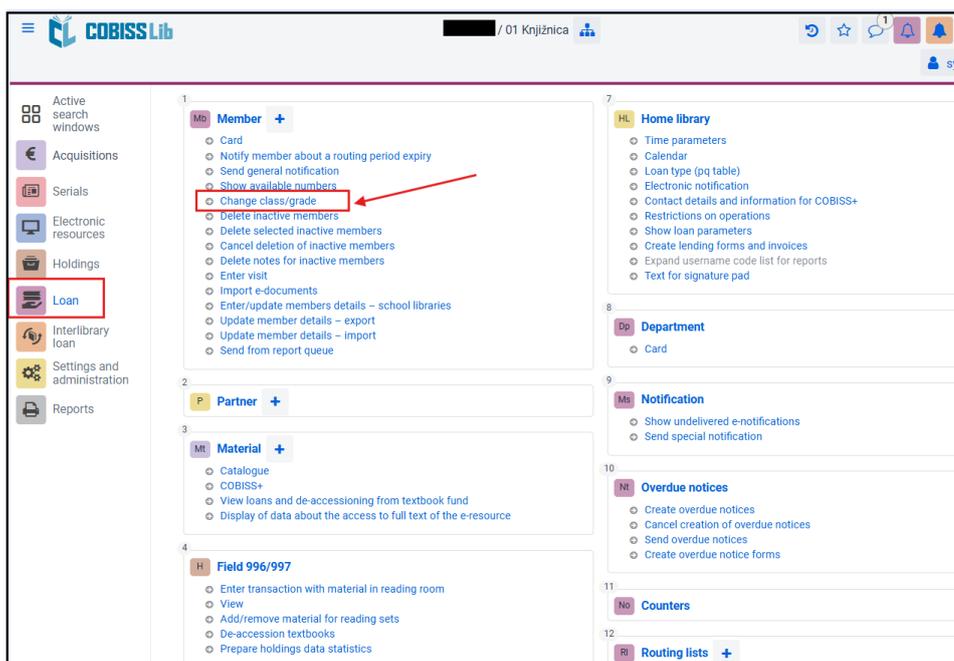
### 3.3 Deleting a member from the database

In the **Member** search window, search for and select a member or multiple members. Deletion is performed using the **Delete member details** procedure. The subsequent steps of this procedure are identical in content to those in COBISS3.



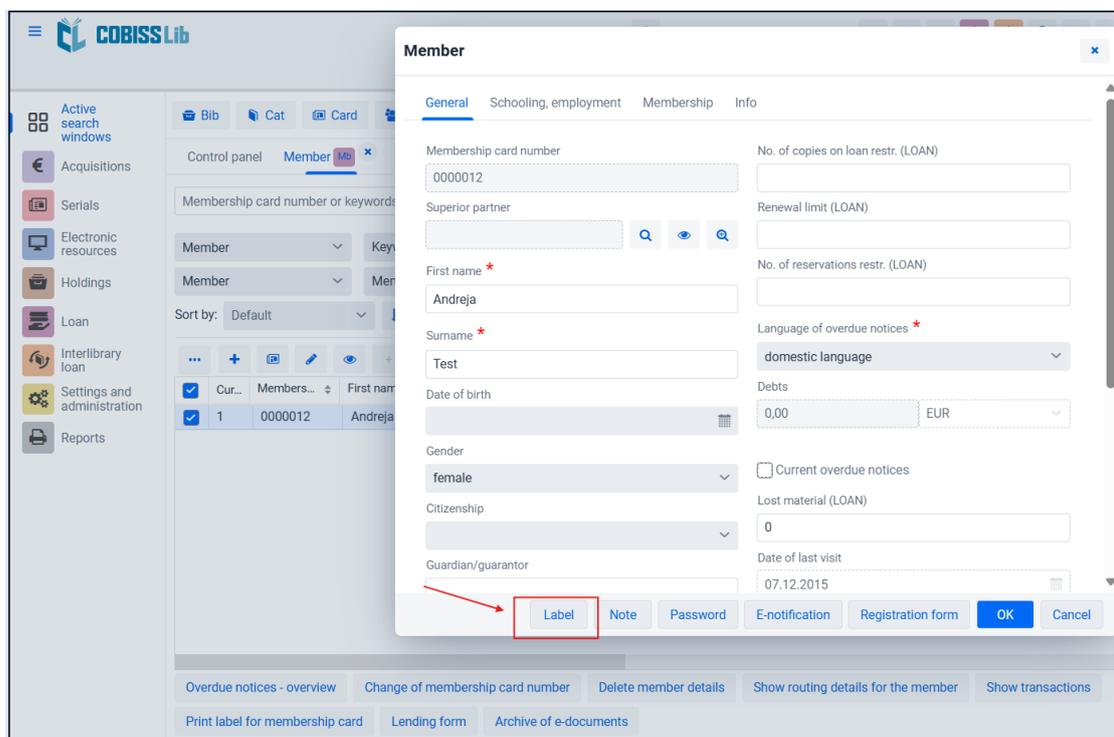
### 3.4 Batch transfer of members to a higher class

The **Change class/grade** procedure is selected in **Loan** in the **Member** content set. It is unchanged in content, the implementation itself is the same as in COBISS3.

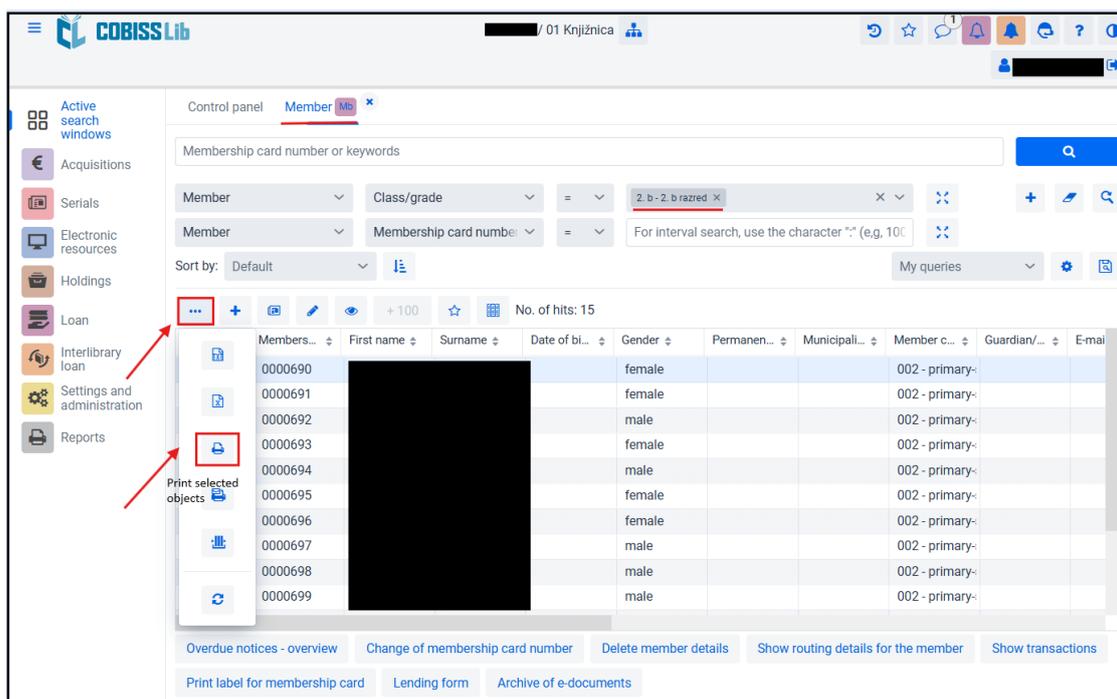


## 3.5 Printing a membership card label

The membership card label can be printed in the same way as in COBISS3 in the **Editor**

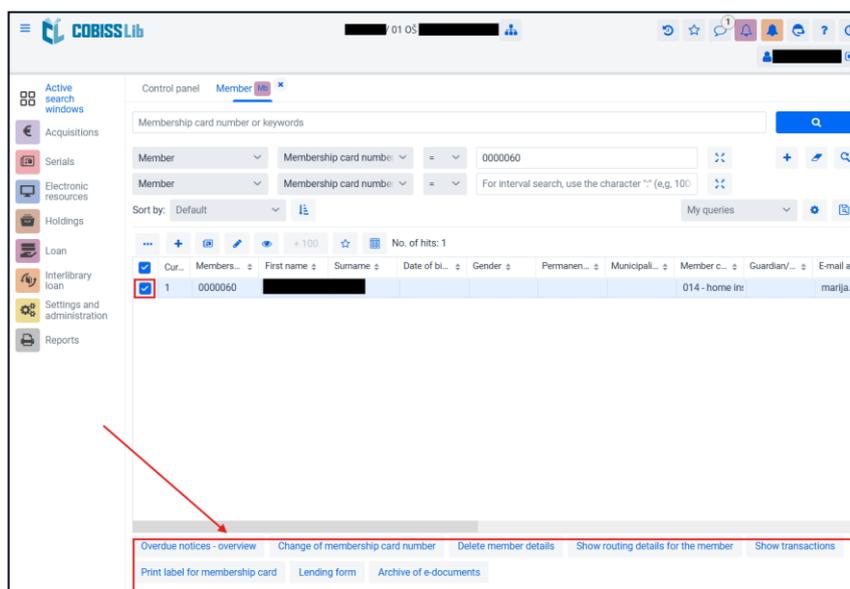


or in the **Member** search window using the **More** method (three dots icon) and selecting **Print** selected objects. This way, you can also print labels for multiple members at once, for example, for the entire class.



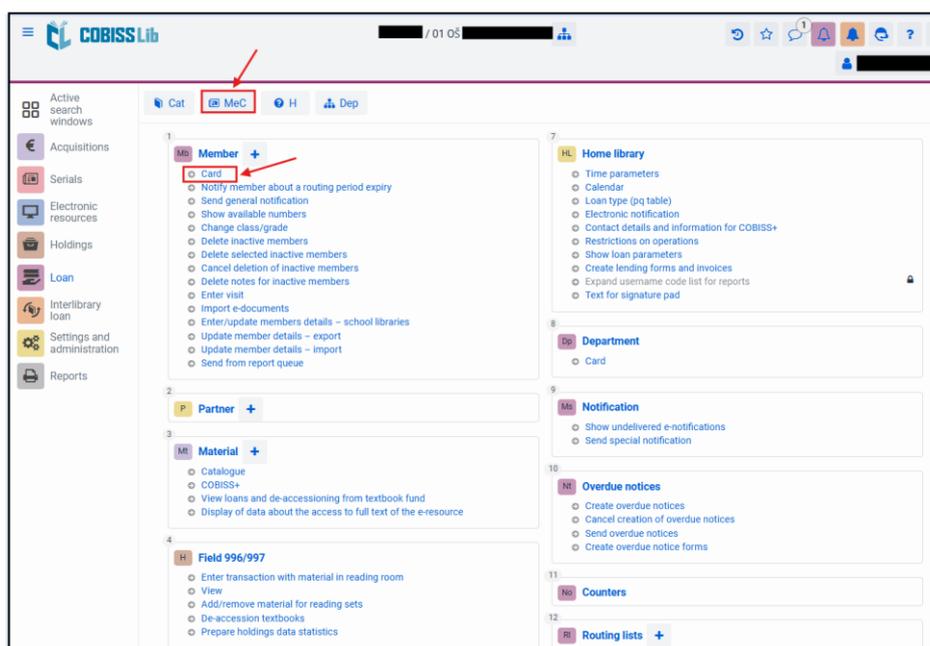
### 3.6 Transferring the entire class to the workspace

There is no workspace in COBISS Lib. Its role is taken over by the search window. Thus, transferring search results to the workspace is no longer necessary, because the procedures are performed directly in the search window with the buttons at the bottom of the page when a member (or several members) is selected.

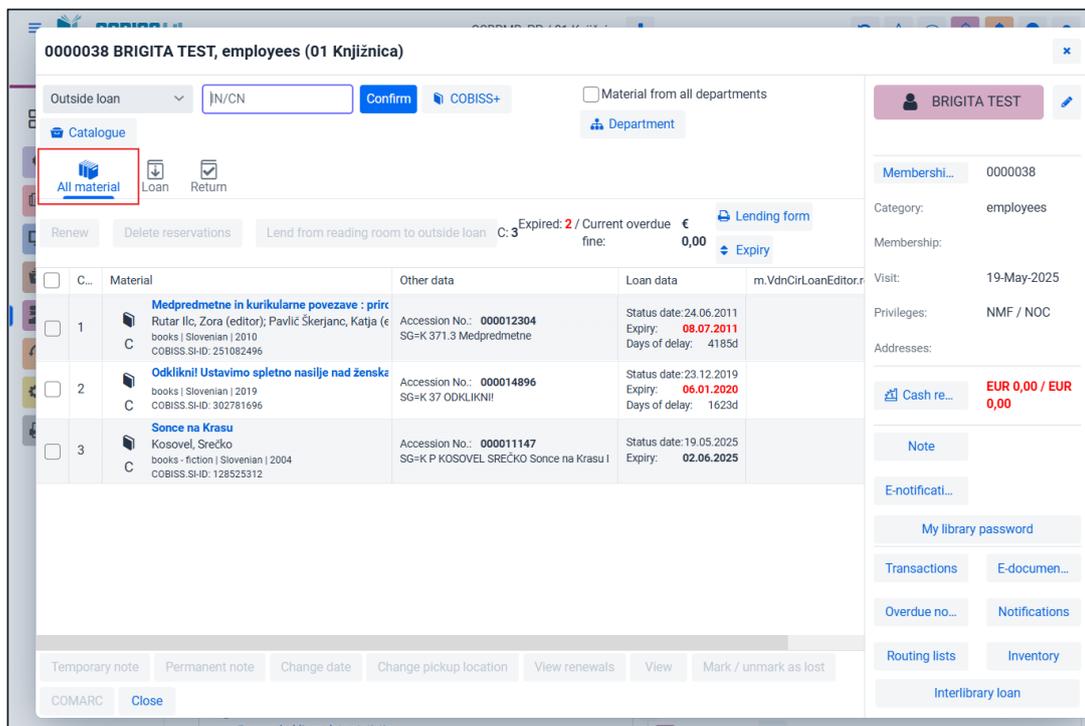
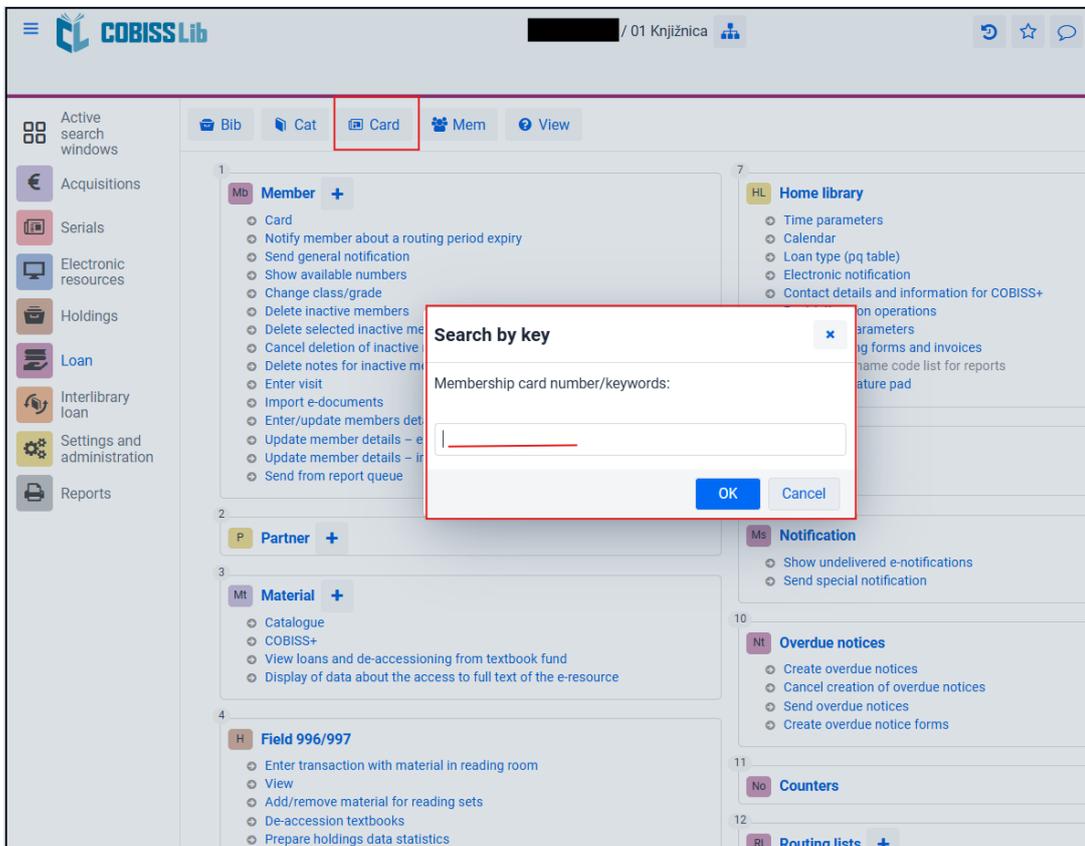


### 3.7 Book loan using a membership card

The fastest way to loan using membership cards is with the **Member / Membership card** method using the **shortcut button** or the **ALT + I** key combination.



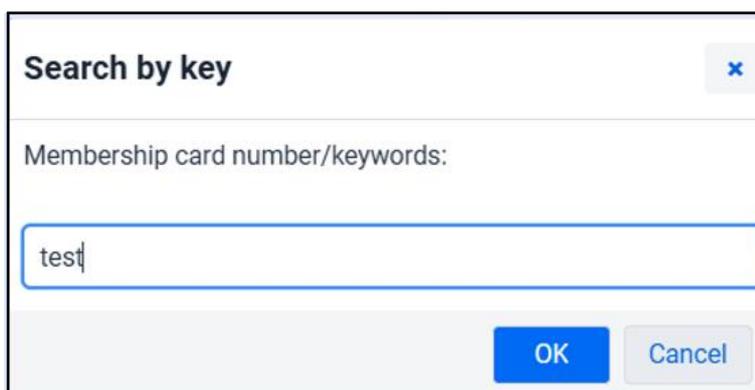
In the window that opens, simply scan the barcode or enter the card number (if you are not using a barcode reader) and that member's card will open.



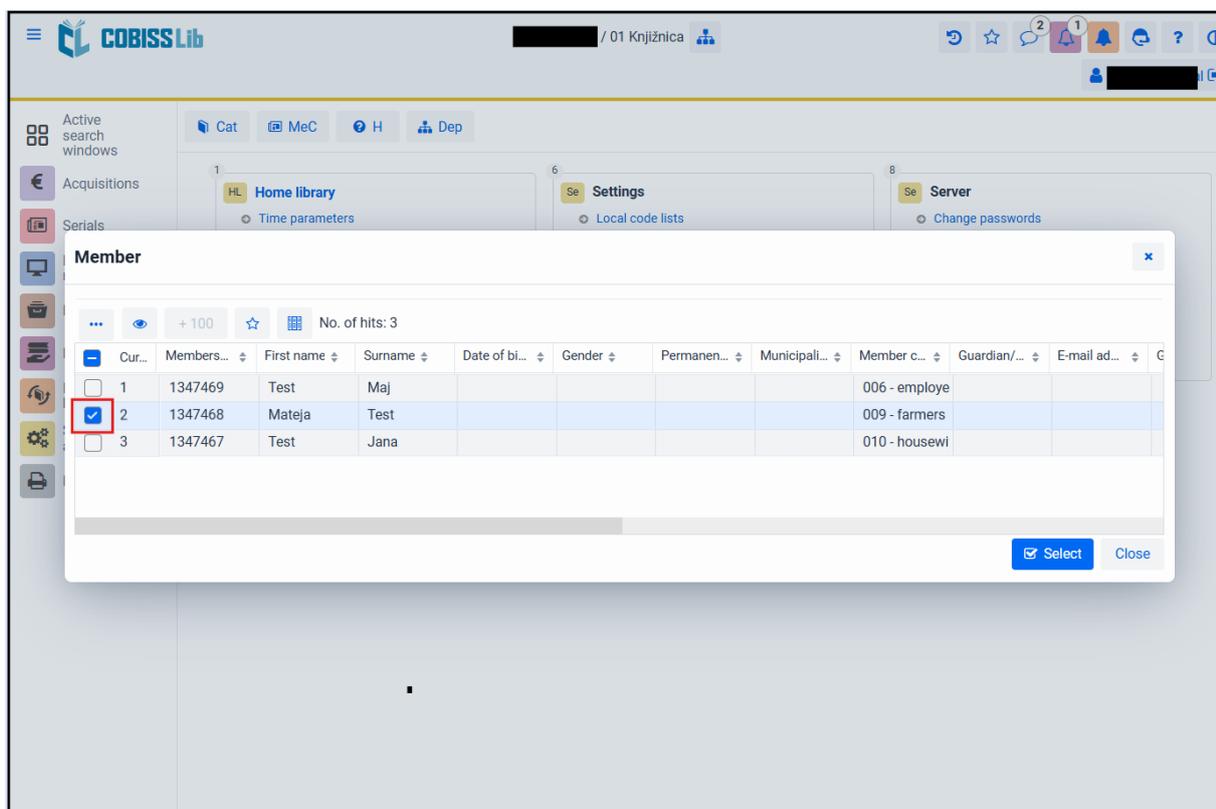
After loaning the material and closing the **Card** window, the window for entering the membership number will open again, where you can enter the next member.

### 3.8 Loaning books without using a membership card

The procedure is carried out in the same way as in section 1. In the window that opens after using the Member/Card method, enter the member's surname and/or first name and the member's card will open. If you enter only the member's surname and there are multiple members with the same surname in the database, a search window will open where you can select the desired member.



A dialog box titled "Search by key" with a close button (X) in the top right corner. Below the title is a label "Membership card number/keywords:" followed by a text input field containing the text "test". At the bottom of the dialog are two buttons: "OK" and "Cancel".



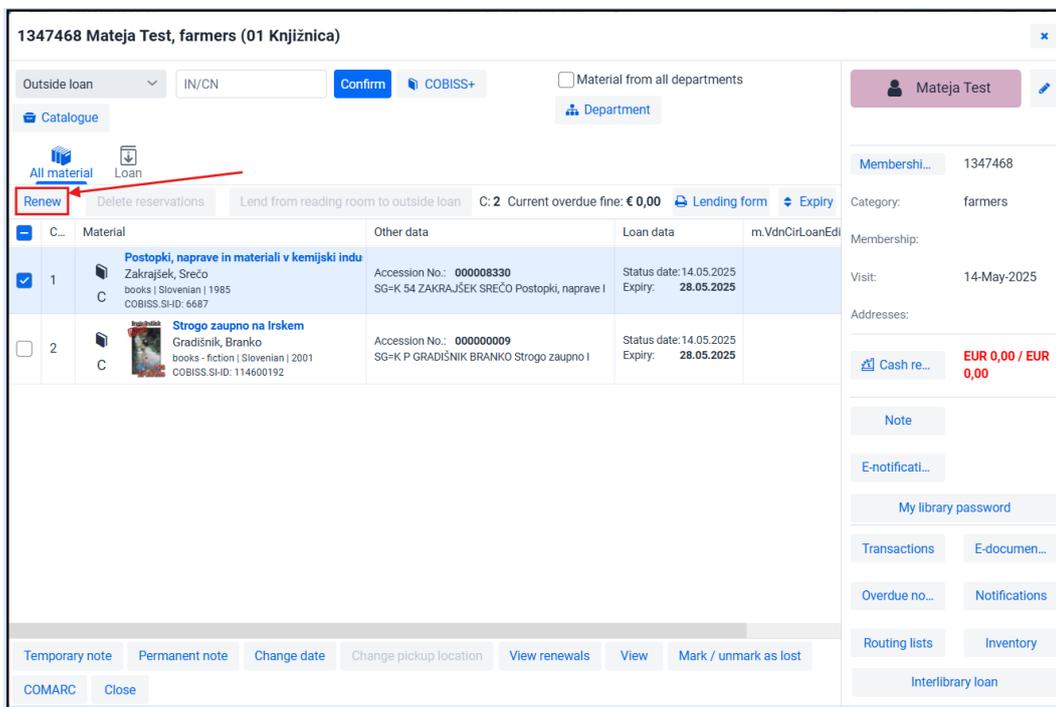
The screenshot shows the COBISS Lib web interface. A "Member" search window is open, displaying a table of search results. The table has columns for "Cur...", "Members...", "First name", "Surname", "Date of bi...", "Gender", "Permanen...", "Municipali...", "Member c...", "Guardian/...", and "E-mail ad...". There are 3 hits. The second row is selected, indicated by a red box around the checkbox and the row itself.

Cur...	Members...	First name	Surname	Date of bi...	Gender	Permanen...	Municipali...	Member c...	Guardian/...	E-mail ad...
<input type="checkbox"/>	1	1347469	Test	Maj				006 - employe		
<input checked="" type="checkbox"/>	2	1347468	Mateja	Test				009 - farmers		
<input type="checkbox"/>	3	1347467	Test	Jana				010 - housewi		

Buttons "Select" and "Close" are visible at the bottom right of the search window.

### 3.9 Loan renewal (for one loaned copy or all copies)

The procedure is performed in the **Card** window. First, select the unit or units for which you want to renew the loan the rental, and then use the **Renew** button.



1347468 Mateja Test, farmers (01 Knjižnica)

Outside loan IN/CN Confirm COBISS+  Material from all departments

Catalogue Department

All material Loan

Renew Delete reservations Lend from reading room to outside loan C: 2 Current overdue fine: € 0,00 Lending form Expiry

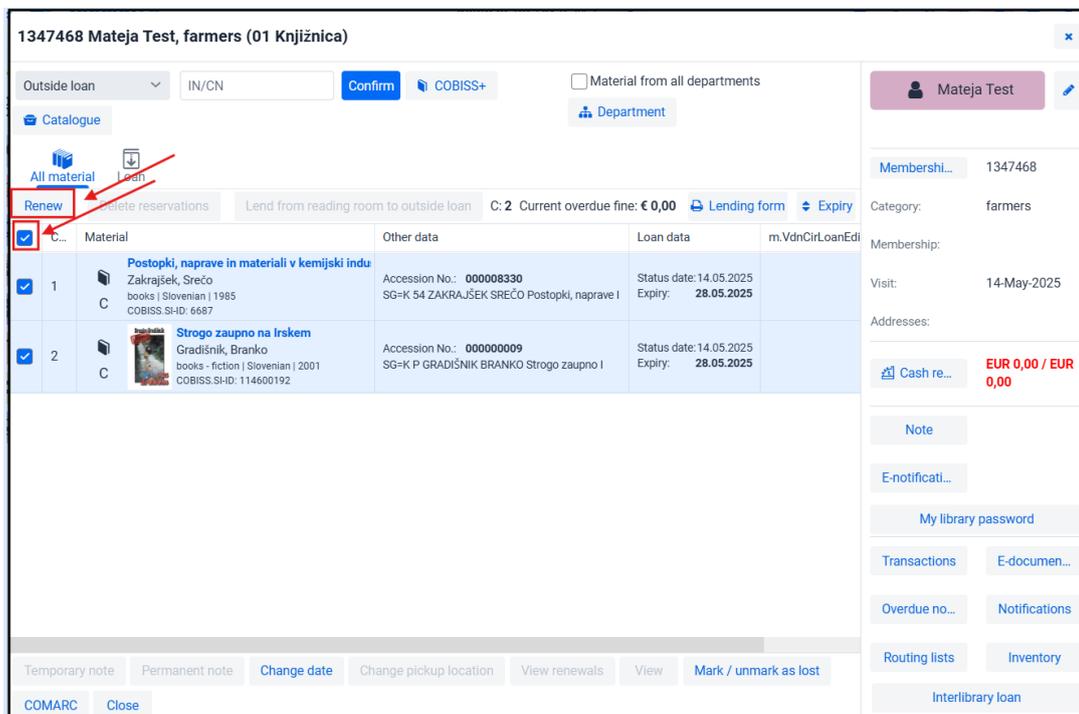
C...	Material	Other data	Loan data	m.VdnCirLoanEdi
<input checked="" type="checkbox"/>	<b>Postopki, naprave in materiali v kemijski indu</b> Zakrajšek, Srečo books   Slovenian   1985 COBISS.SI-ID: 6687	Accession No.: 000008330 SG=K 54 ZAKRAJŠEK SREČO Postopki, naprave I	Status date: 14.05.2025 Expiry: 28.05.2025	
<input type="checkbox"/>	<b>Strogo zaupno na Irskem</b> Gradišnik, Branko books - fiction   Slovenian   2001 COBISS.SI-ID: 114600192	Accession No.: 000000009 SG=K P GRADIŠNIK BRANKO Strogo zaupno I	Status date: 14.05.2025 Expiry: 28.05.2025	

Membership: 1347468  
 Category: farmers  
 Membership:  
 Visit: 14-May-2025  
 Addresses:  
 Cash re... EUR 0,00 / EUR 0,00  
 Note  
 E-notificati...  
 My library password  
 Transactions E-documen...  
 Overdue no... Notifications  
 Routing lists Inventory  
 Interlibrary loan

Temporary note Permanent note Change date Change pickup location View renewals View Mark / unmark as lost

COMARC Close

The quickest way to select all units is to check the box in the title bar.



1347468 Mateja Test, farmers (01 Knjižnica)

Outside loan IN/CN Confirm COBISS+  Material from all departments

Catalogue Department

All material Loan

Renew Delete reservations Lend from reading room to outside loan C: 2 Current overdue fine: € 0,00 Lending form Expiry

C...	Material	Other data	Loan data	m.VdnCirLoanEdi
<input checked="" type="checkbox"/>	<b>Postopki, naprave in materiali v kemijski indu</b> Zakrajšek, Srečo books   Slovenian   1985 COBISS.SI-ID: 6687	Accession No.: 000008330 SG=K 54 ZAKRAJŠEK SREČO Postopki, naprave I	Status date: 14.05.2025 Expiry: 28.05.2025	
<input checked="" type="checkbox"/>	<b>Strogo zaupno na Irskem</b> Gradišnik, Branko books - fiction   Slovenian   2001 COBISS.SI-ID: 114600192	Accession No.: 000000009 SG=K P GRADIŠNIK BRANKO Strogo zaupno I	Status date: 14.05.2025 Expiry: 28.05.2025	

Membership: 1347468  
 Category: farmers  
 Membership:  
 Visit: 14-May-2025  
 Addresses:  
 Cash re... EUR 0,00 / EUR 0,00  
 Note  
 E-notificati...  
 My library password  
 Transactions E-documen...  
 Overdue no... Notifications  
 Routing lists Inventory  
 Interlibrary loan

Temporary note Permanent note Change date Change pickup location View renewals View Mark / unmark as lost

COMARC Close

### 3.10 Change of due date

To set a desired return date, select the desired units and then select the **Change flow** button.

The screenshot shows the COBISS+ interface for a loan record. The main table lists two loan items:

C...	Material	Other data	Loan data	m.VdnCirLoanEdi
<input checked="" type="checkbox"/>	1 Postopki, naprave in materiali v kemijski indu Zakrajšek, Srečo books   Slovenian   1985 COBISS.SHD: 6687	Accession No.: 000008330 SG=K 54 ZAKRAJŠEK SREČO Postopki, naprave I	Status date: 14.05.2025 Expiry: 28.05.2025	
<input checked="" type="checkbox"/>	2 Strogo zaupno na Irskem Gradišnik, Branko books - fiction   Slovenian   2001 COBISS.SHD: 114600192	Accession No.: 000000009 SG=K P GRADIŠNIK BRANKO Strogo zaupno I	Status date: 14.05.2025 Expiry: 28.05.2025	

At the bottom of the interface, the 'Change date' button is highlighted with a red box and a red arrow points to it. Other buttons include 'Temporary note', 'Permanent note', 'Change pickup location', 'View renewals', 'View', and 'Mark / unmark as lost'. The right sidebar shows user information for 'Mateja Test' and various options like 'Membership', 'Category', 'Membership', 'Visit', 'Addresses', 'Cash re...', 'Note', 'E-notificati...', 'My library password', 'Transactions', 'E-documen...', 'Overdue no...', 'Notifications', 'Routing lists', 'Inventory', and 'Interlibrary loan'.

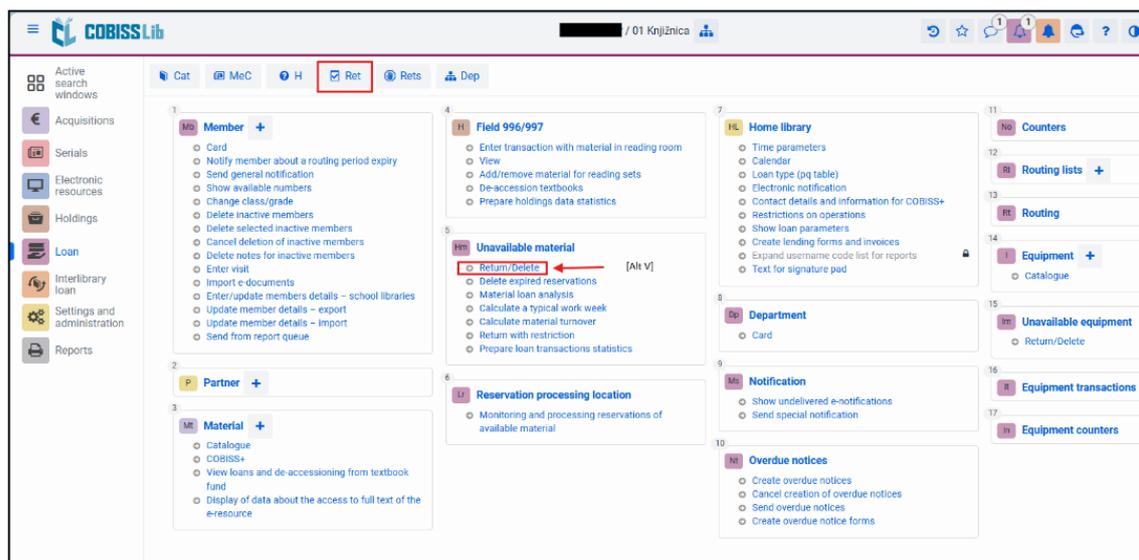
In the window that opens, enter any date, select it from the calendar, or specify **Loan period not specified**.

The screenshot shows the 'Due date' dialog box overlaid on the loan record. The dialog box has a text input field with a red box around it, a calendar icon, and a 'Loan period not specified' button highlighted with a red box. The background shows the same loan record as the previous screenshot.

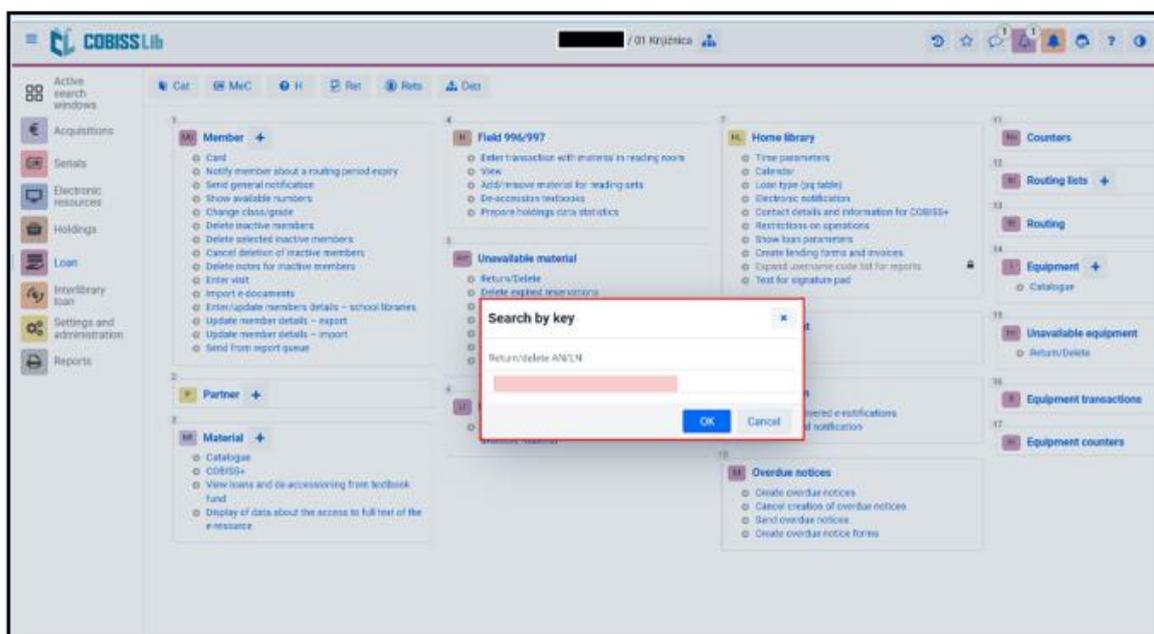
### 3.11 Return of a loaned book, whether the user is known or unknown

The fastest way to return is always with the **Unavailable material / Return/Delete** method using the **shortcut button** or the **ALT + V** key combination. You use this method in all cases, whether you know the member or not.

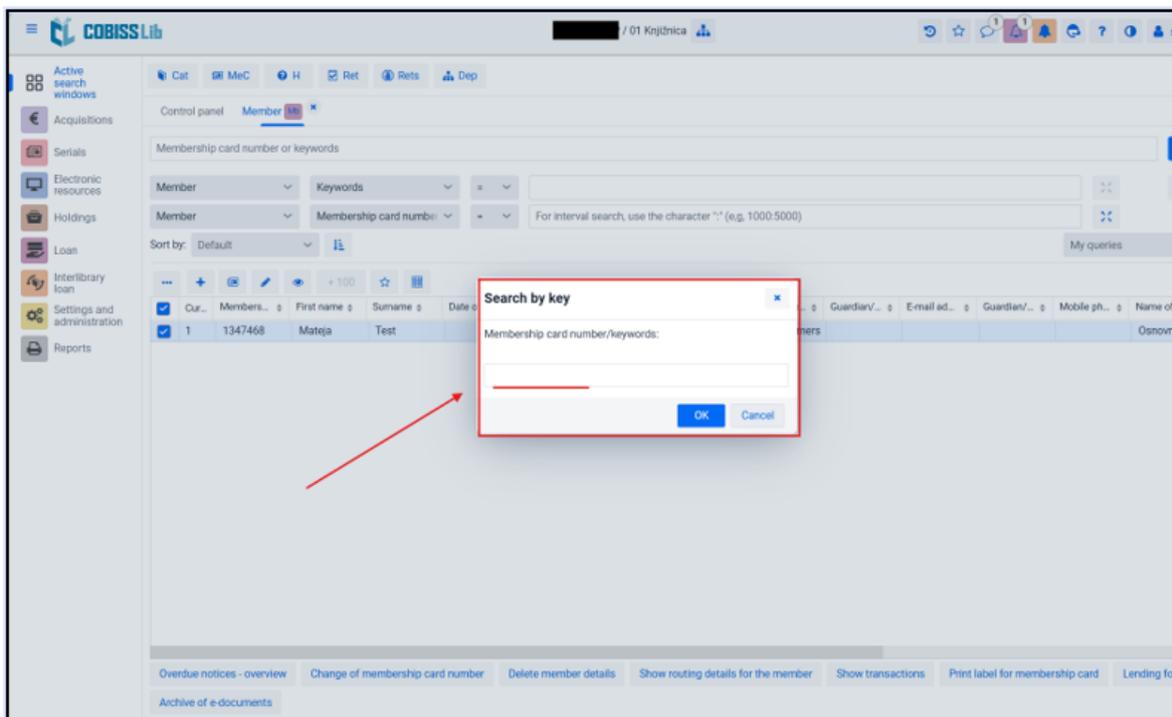
Instructions for setting up shortcut buttons: [4.1 Setting shortcuts for performing procedures.](#)



In the window that opens, simply scan the barcode or enter the accession number (if you are not using a barcode reader) and the material is returned without opening the card.

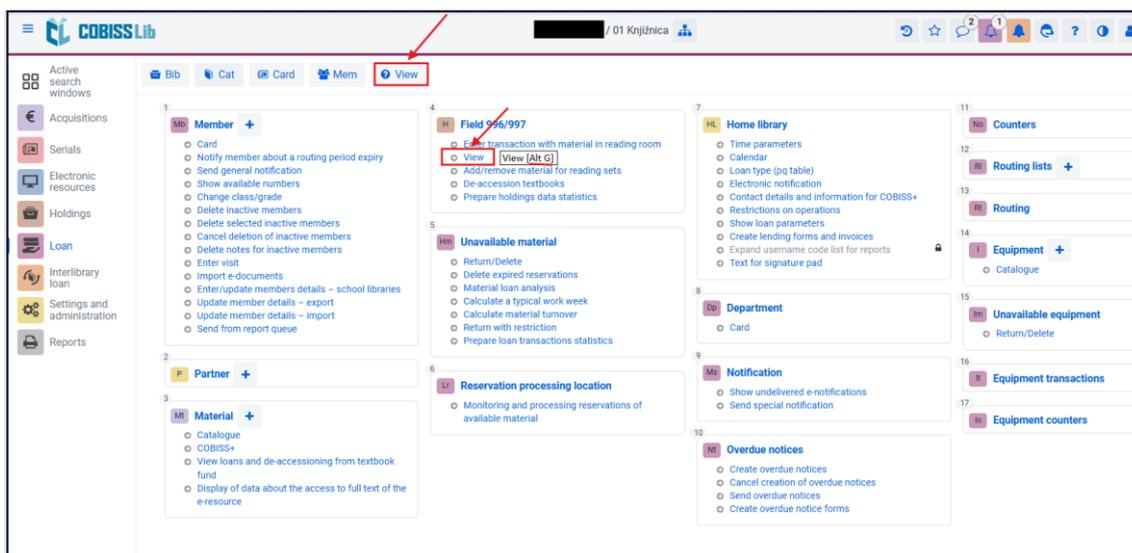


The member from whom we last returned the material is loaded into the **Member** search window. The window for entering the accession number opens again.

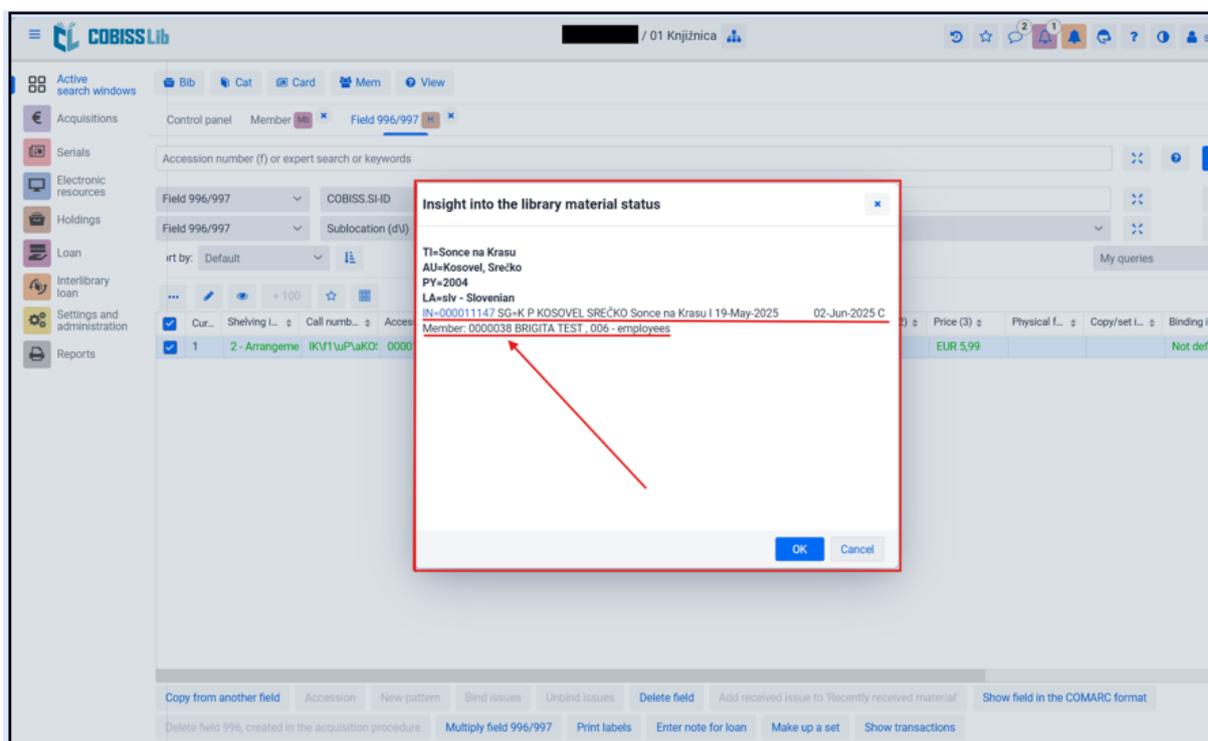


### 3.12 Checking if material is available or on loan

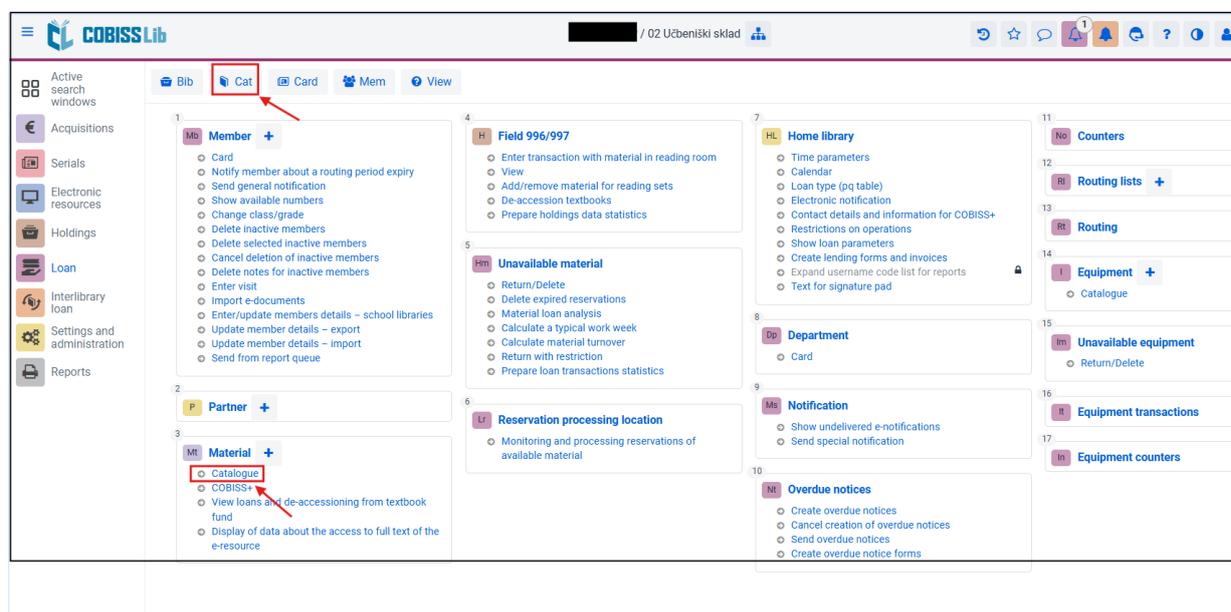
There are several ways to check the loan status. If you have a book in front of you on the counter and you don't know whether it is on loan or available, you use the procedure **Field 996/997 / Check**. This method also allows you to use the **shortcut** or the **ALT + G** key combination.



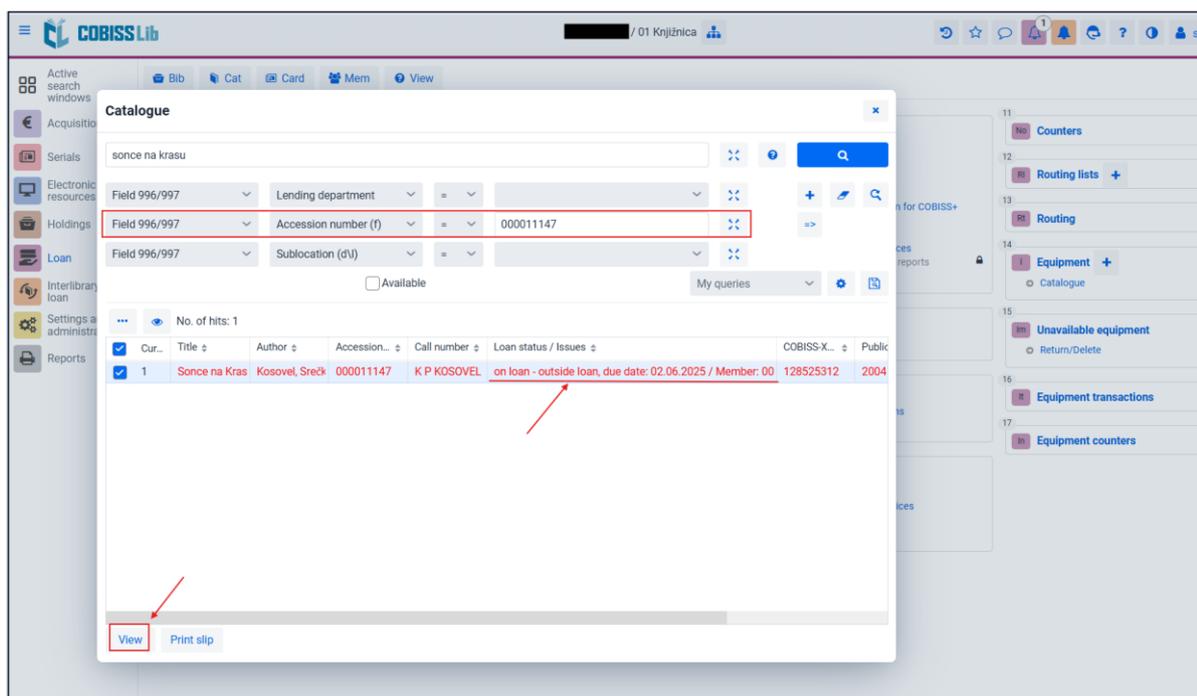
In the window that opens, enter or read the accession number and information about the holdings of this material and its possible loan status will be displayed.



The loan status of a copy can also be checked in the **Catalogue**.

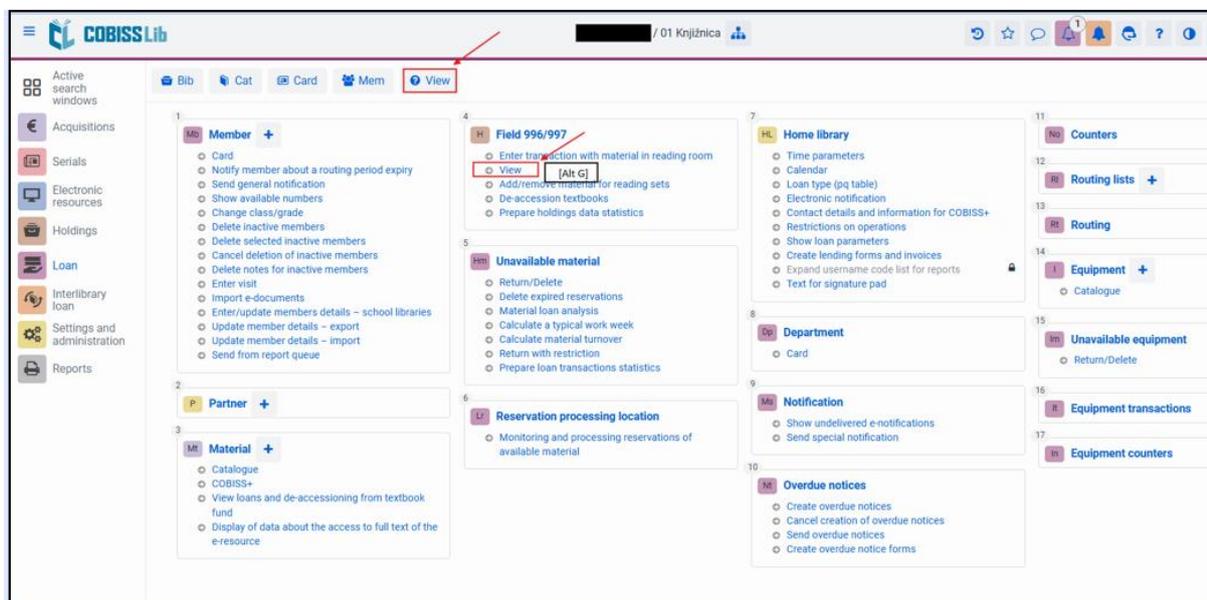


In the catalogue window, we can then search for material by various attributes, including accession number. The library can decide to make it visible in this window which member has the material on loan. If you have not chosen this option, you can use the **View** button.

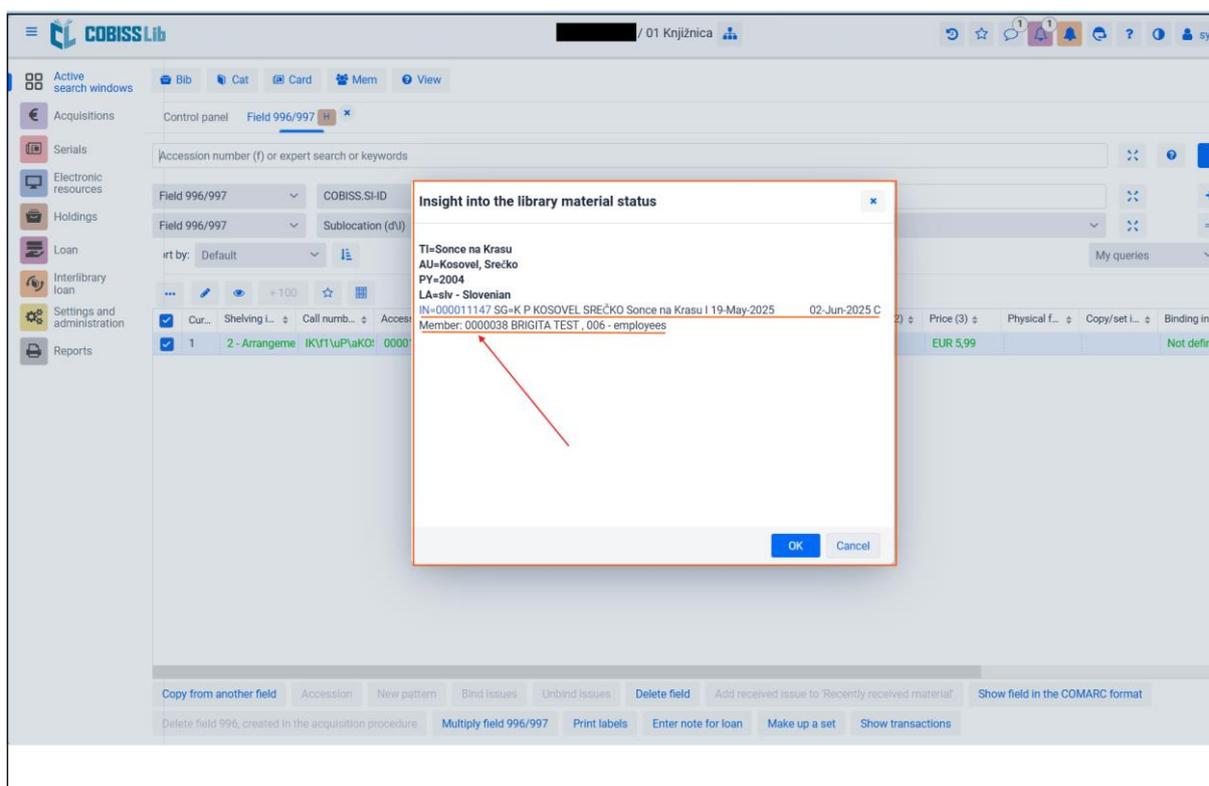


### 3.13 How do you find out which member has a book on loan

The quickest way to check this is to use the **Field 996/997 / View** procedure. This method also allows you to use the **shortcut** or the **ALT + G** key combination.



In the window that opens, enter or scan the accession number and holdings data for this material and its possible loan status will be displayed.



### 3.14 Overdue notices (printing)

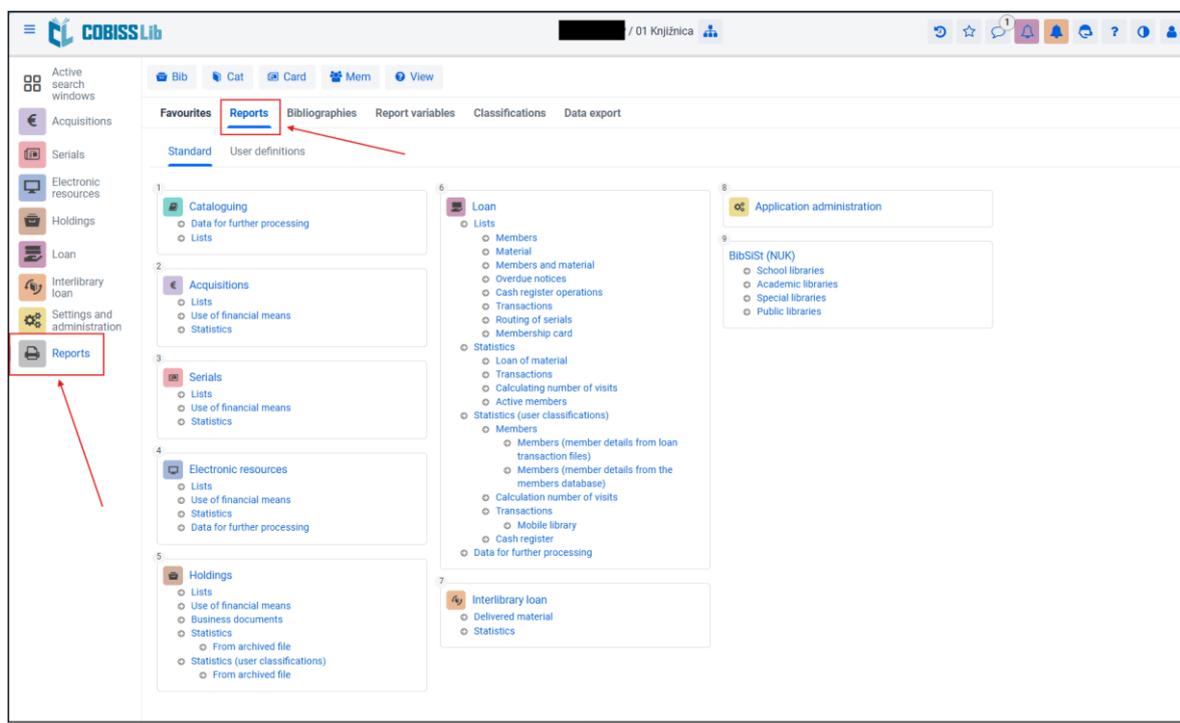
Most school libraries completed the *COBISS3/Loan (basic procedures)* course when entering the COBISS system. This course does not give the library the privilege to create overdue notices and thus cannot create them unless it attends additional training.

## 4 COBISS Lib/Reports

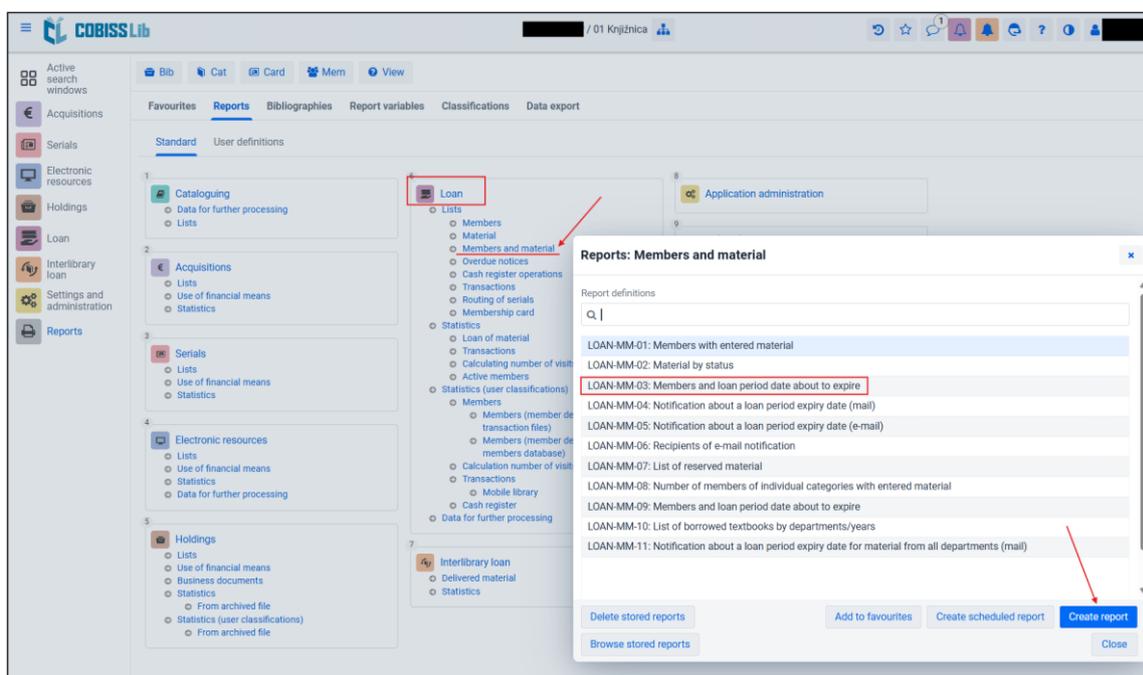
### 4.1 Creating the report LOAN-MM-03: Members and loan period date about to expire

When creating all types of reports in the Reports module, we recommend using the **Favourite reports** option. This will greatly speed up the work with reports in the library.

You create reports in the **Reports** module in the **Reports** tab.

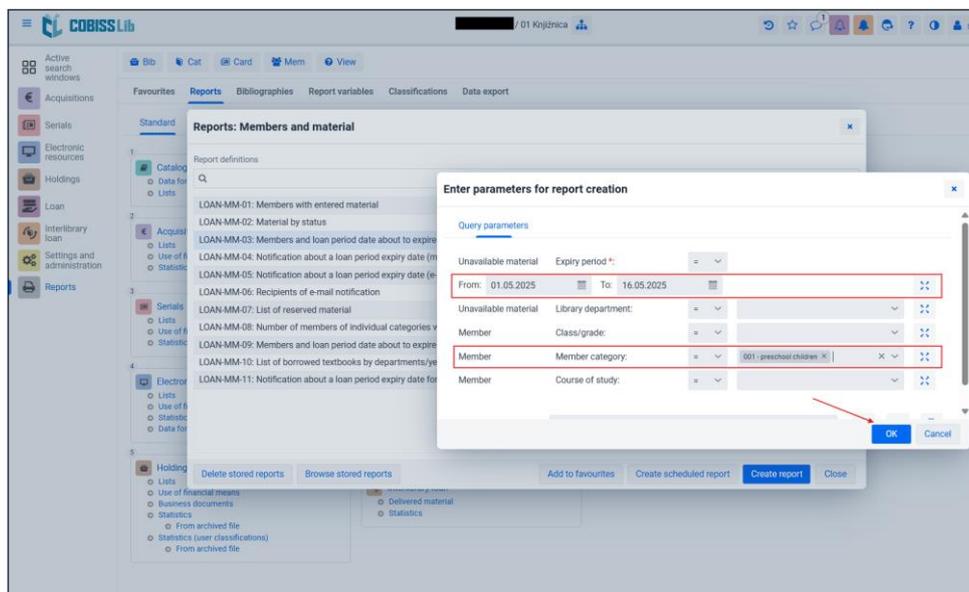


The report ***LOAN-MM-03: Members and loan period date about to expire*** can be found in Loan in the **Members and Material** group.



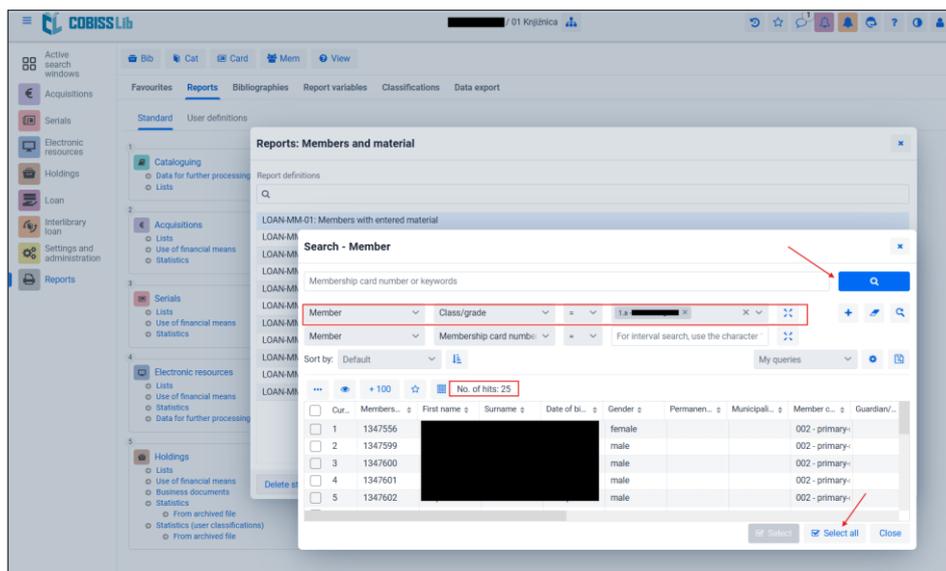
After selecting the **Create report** button, the window for **Enter parameters for report creation** opens, which you enter accordingly depending on the data you want to obtain. This report is most often used at the end of the school year to create lists of students who still owe material and to forward these lists to class teachers. In this case, you must reasonably determine the **Expiry period**, which is usually from the beginning to the end of the school year. The due date can be adjusted according to the needs at a given time.

The report is created by class/year, so additional restriction by this attribute is not necessary if you want to create a list for all students at the school. If you want to exclude teachers/professors from the list, the easiest way to do this is by specifying a category (002 – primary school pupils or 003 – secondary school pupils).



## 4.2 Creating the report LOAN-MM-01: Members with entered material

The report can be found in **Loan** in the **Members and material** group. It is created in the same way as described in the previous section, with the difference that it can be created for any members, as the search query is entered in two steps. In the first step, you define and select the members you want to include in the report in the search window. In the second step, you determine the conditions in connection with the material on loan.



Enter parameters for report creation

Query parameters

Unavailable material	Date of loan or reservation:	=	From: 01.01.2025	To: 30.04.2025	
Unavailable material	Author:	=			
Unavailable material	Call number:	=			
Unavailable material	Availability level:	=			
Unavailable material	Status:	=			
Unavailable material	Loan restriction:	=			
Unavailable material	Note on item:	=			
Unavailable material	Temporary note:	=			
Unavailable material	Type of material:	=			
Unavailable material	Transaction department:	=			
Unavailable material	Loan status *:	=	c - on loan	k - in circulation	s - on loan (reading room)

Load/save parameters: + new configuration

OK Cancel

### 4.3 Printing a list of material on loan for an individual member

You prepare it in the same way as in section 4.2, with a lending form or report *LOAN-MM-01: Members with entered material*.

In the report *LOAN-MM-01: Members with entered material* you must specify the **Transaction department** in the second window for entering input parameters for creating the report when creating such a list.

Enter parameters for report creation

Query parameters

Unavailable material	Date of loan or reservation:	=	From: 01.09.2024	To: 01.09.2024	
Unavailable material	Author:	=			
Unavailable material	Call number:	=			
Unavailable material	Availability level:	=			
Unavailable material	Status:	=			
Unavailable material	Loan restriction:	=			
Unavailable material	Note on item:	=			
Unavailable material	Temporary note:	=			
Unavailable material	Type of material:	=			
Unavailable material	Transaction department:	=	01 - Knjižnica		
Unavailable material	Loan status *:	=	s - on loan (reading room)	c - on loan	k - in circulation

Load/save parameters: + new configuration

OK Cancel Close

## 4.4 Printing a list of material on loan by class

The procedure is described in section [4.1](#). Use the report *LOAN-MM-03: Members and loan period date about to expire*, which can be found in **Loan** in the **Member** and **Material** group.

## 4.5 Printing a list of material on loan by location

Prepare it in the same way as in section [4.2](#). In the report *LOAN-MM-01: Members with entered material* you must specify the **Transaction department** in the second window for entering input parameters for creating the report when creating such a list.

The screenshot shows a dialog box titled "Enter parameters for report creation". It contains a list of query parameters for report creation. The parameters are:

- Unavailable material Date of loan or reservation: = [dropdown] From: 01.09.2024 [calendar icon] To: 15.06.2025 [calendar icon] [X]
- Unavailable material Author: = [dropdown] [input field] [X]
- Unavailable material Call number: = [dropdown] [input field] [X]
- Unavailable material Availability level: = [dropdown] [dropdown menu] [X]
- Unavailable material Status: = [dropdown] [dropdown menu] [X]
- Unavailable material Loan restriction: = [dropdown] [input field] [X]
- Unavailable material Note on item: = [dropdown] [input field] [X]
- Unavailable material Temporary note: = [dropdown] [input field] [X]
- Unavailable material Type of material: = [dropdown] [dropdown menu] [X]
- Unavailable material Transaction department: = [dropdown] 01 - Knjižnica [X] [X]
- Unavailable material Loan status \*: = [dropdown] s - on loan (reading room) [X] c - on loan [X] k - in circulation [X] [X]

At the bottom, there is a "Load/save parameters:" section with a "+ new configuration" button and a dropdown menu. To the right of this section are icons for refresh, close, and print. At the bottom right, there are "OK" and "Cancel" buttons. A red arrow points to the "OK" button.

## 4.6 Printing a list of overdue material for an individual member

Prepare it in the same way as in section [4.2](#). In the report *LOAN-MM-01: Members with entered material*, which can be found in **Loan** in the **Members and material** group, specify a period in **Date of loan or reservation** older than today, from which you subtract the loan period, for example, from the beginning of the school year to a date 21 days before today's date. This way, the list will include all material for which loan period has already expired, if the library does not allow renewals.

## 4.7 Printing a list of overdue material for an individual member based on location

Prepare it in the same way as in section [4.2](#). In the report *LOAN-MM-01: Members with entered material*, which can be found in **Loan** in the **Members and material** group, specify a period in **Date of loan or reservation** older than today, from which you subtract the loan period, for example, from the beginning of the school year to a date 21 days before today's date. This way, the list will include all material for which loan period has already expired, if the library does not allow renewals. You also specify the **Transaction department** and thereby limit the report based on location.

## 4.8 Printing a list of overdue material by class

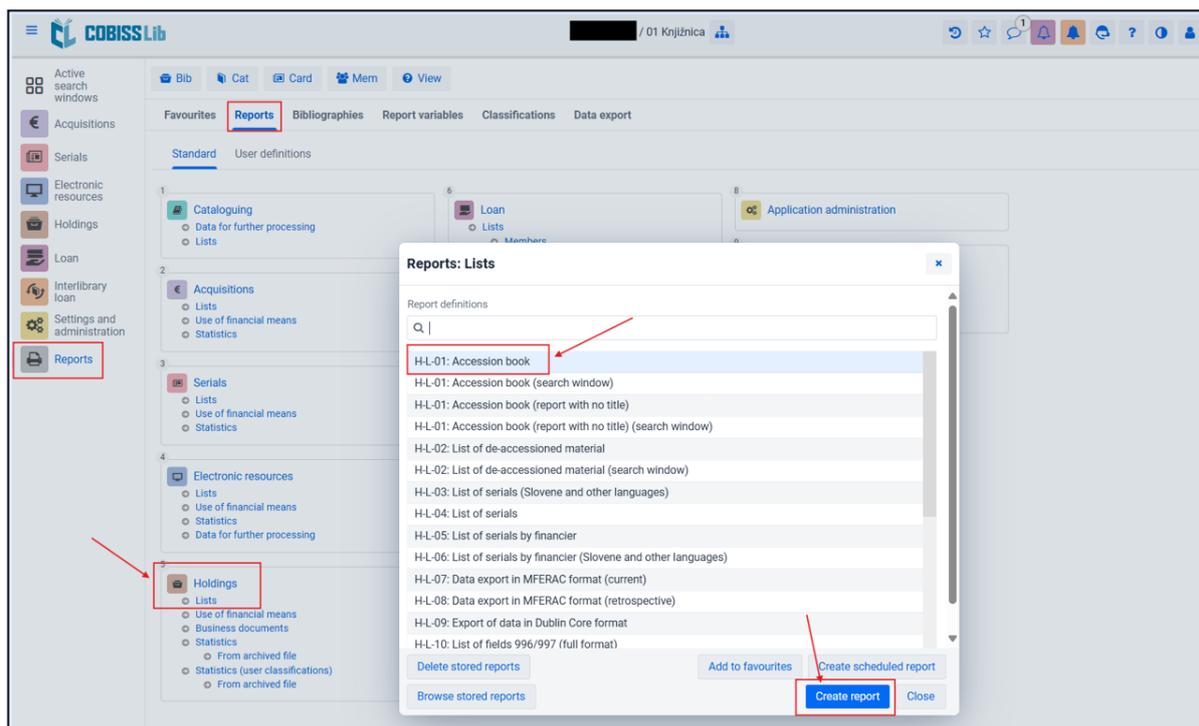
Prepare it in the same way as in section [4.1](#). Use the report *LOAN-MM-03: Members and loan period date about to expire*, which can be found in **Loan** in the **Member** and **Material** group. In **Expiry period**, you specify a period older than today, for example, from the beginning of the school year to yesterday. This way, the list will include all material for which loan period has already expired. By default, all classes are included in such a list, unless otherwise specified in the input parameters window.

## 4.9 Printing a list of overdue members by location

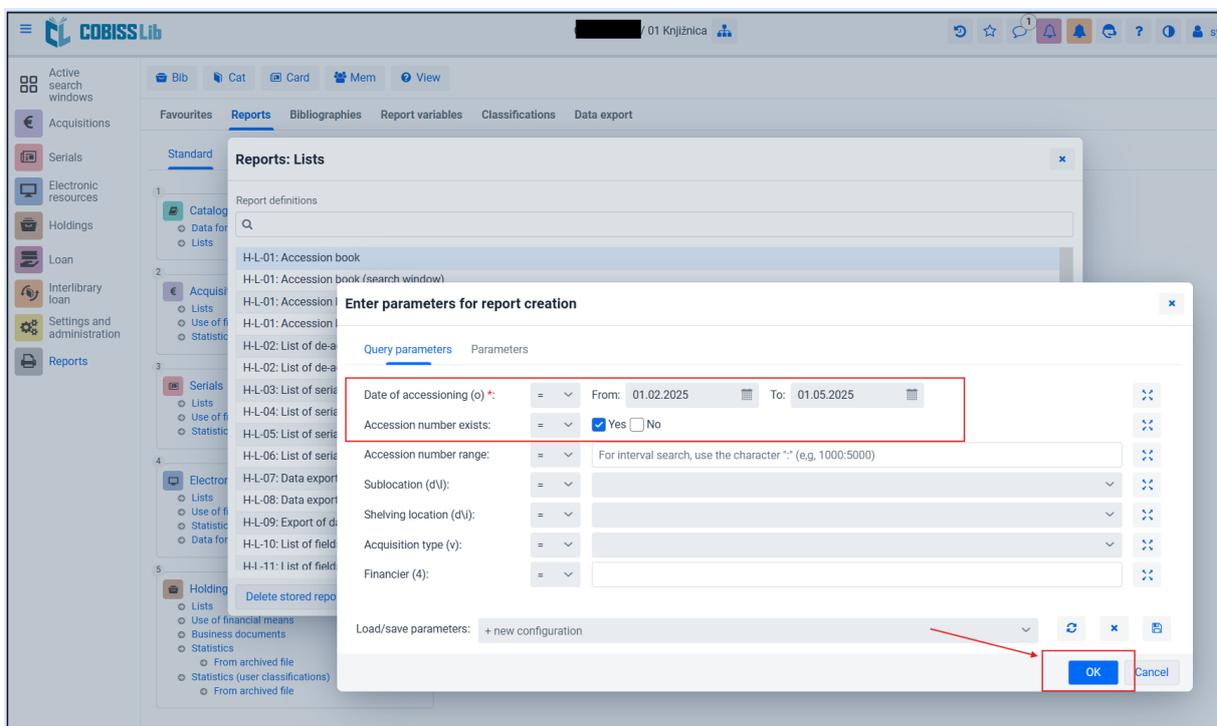
The procedure is described in section [4.1](#). Use the report *LOAN-MM-03: Members and loan period date about to expire*, which can be found in **Loan** in the **Member** and **Material** group. In **Expiry period**, you specify a period older than today, for example, from the beginning of the school year to yesterday. This way, the list will include all material for which loan period has already expired. You also specify the Library department and thus limit the report based on location.

## 4.10 H-L-01: Accession book

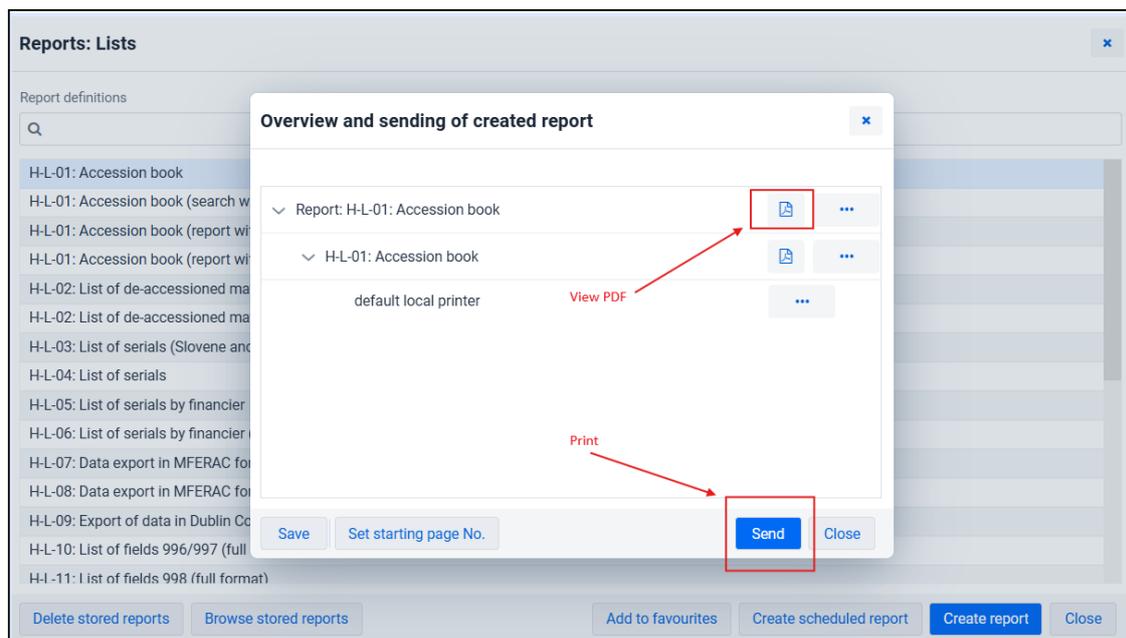
The report *H-L-01: Accession book* can be found in **Holdings** in the **Lists** group.



The parameters for creating a report are specified in the **Enter parameters for report creation** window. The set of attributes in this window is fixed and unchangeable, so for example, you cannot exclude de-accessioned material.

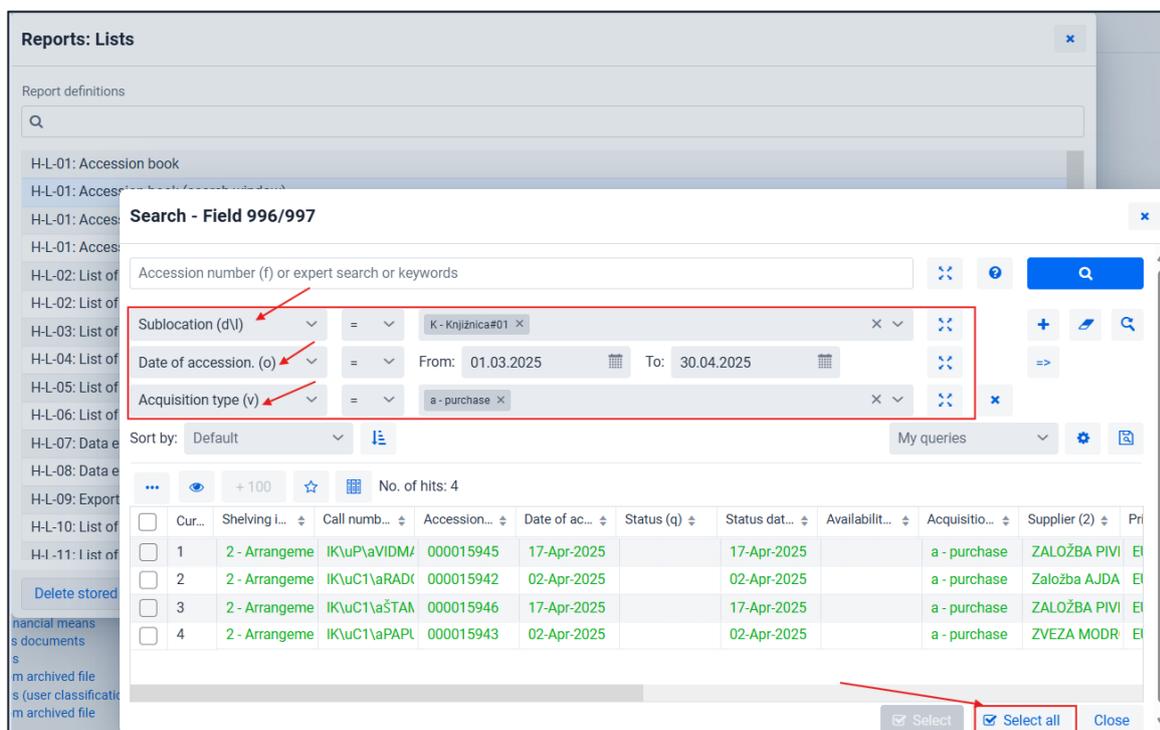


The created report can be printed or viewed in PDF format in the **Overview and sending of created report** window.



## 4.11 H-L-01: Accession book (search window)

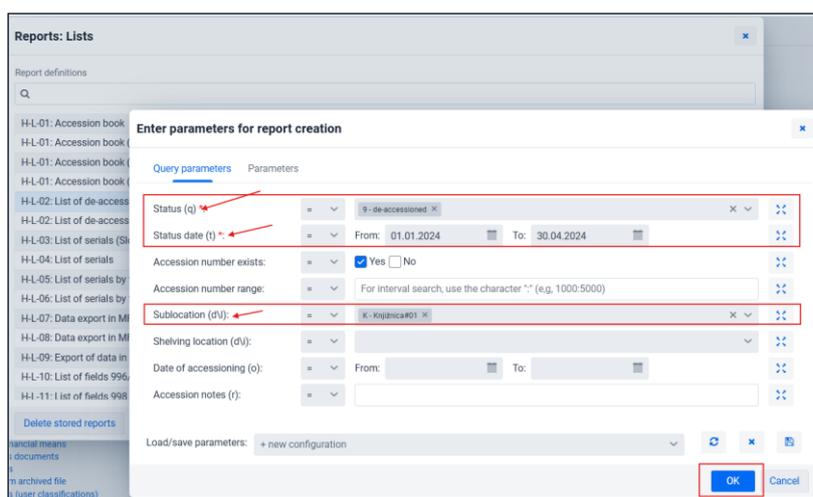
The report ***H-L-01: Accession book (search window)*** can be found in **Holdings** in the **Lists** group. In this case, the search query for creating the report is specified using the **Field 996/997** search window. This makes it very easy to precisely determine the units you are interested in, for example, by the acquisition type for the current school year at a specific sublocation.



The created report does not differ in content from the report H-L-01: Accession book.

## 4.12 H-L-02: List of de-accessioned material

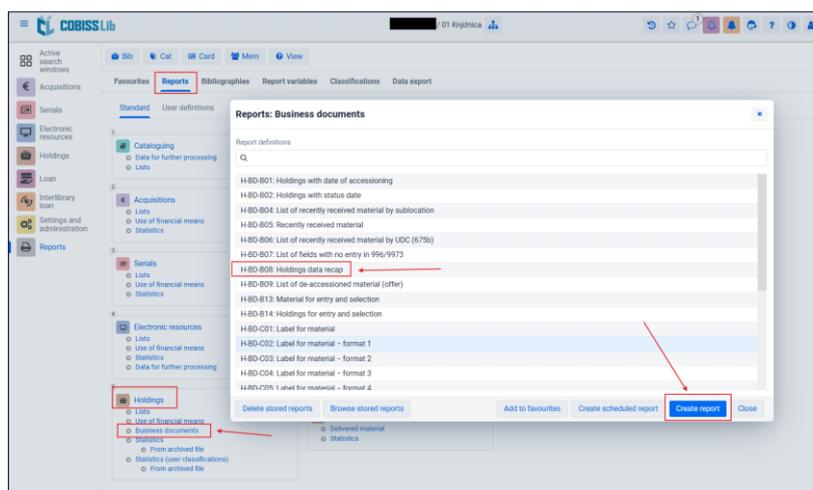
The report ***H-L-02: List of de-accessioned material*** can be found in **Holdings** in the **Lists** group. You create it in the same way as described in section 4.10. The only difference is in the attributes used to define the extent. **Status (q)** and **Status date (t)** are required. You usually also specify the **Sublocation (d\l)** attribute to distinguish the library fund from the textbook fund.



You also have a report available for preparing a list of de-accessioned material with a extent determination in the search window ***H-L-02: List of de-accessioned material (search window)***. The creation method is the same as described in section 4.11. Of course, you select and define the appropriate attributes by which you want to limit the search. Again, it makes sense to use at least the attributes **Status (q)** and **Status date (t)**.

## 4.13 Number of fields 996/997 (units) for the annual report

Data on the number and value of units purchased in a certain time period is created using the report ***H-BD-B08: Holdings data recap***. The report can be found in **Holdings** in the **Business documents** group.



The parameters for preparing the report are specified in the **Field 996/997** search window. This makes it very easy to precisely determine the units you are interested in, for example, by the acquisition type for the current school year at a specific sublocation.

**Search - Field 996/997**

Accession number (f) or expert search or keywords

Sublocation (dV) = K - Knjižnica#01

Date of accession. (o) = From: 01.11.2024 To: 31.05.2025

Acquisition type (v) = a - purchase

Sort by: Default

No. of hits: 64

Cur...	Shelving i...	Call numb...	Accession...	Date of ac...	Status (q)	Status dat...	Availabilit...	Acquisitio...	Supplier (2)
1	2 - Arrangeme	IK\u022aVALV	000015954	13-May-2025		13-May-2025		a - purchase	Založba M
2	2 - Arrangeme	IK\u022aPRITC	000015928	14-Feb-2025		14-Feb-2025		a - purchase	Založba M
3	2 - Arrangeme	IK\u022aPRITC	000015929	14-Feb-2025		14-Feb-2025		a - purchase	Založba M
4	2 - Arrangeme	IK\u022aPRITC	000015930	14-Feb-2025		14-Feb-2025		a - purchase	Založba M
5	2 - Arrangeme	IK\u022aDON	000015835	04-Dec-2024		04-Dec-2024		a - purchase	STARŠI BA
6	2 - Arrangeme	IK\u022aCUI	000015894	29-Jan-2025		29-Jan-2025		a - purchase	Založba Ef
7	2 - Arrangeme	IK\u022aBRIG	000015927	14-Feb-2025		14-Feb-2025		a - purchase	Založba M

Select Select all Close

You also enter a **Comment in the title** of the report so that you know what data it is about.

**Enter parameters for report creation**

Parameters

Comment in the title \*

Purchase from Nov \*24 to today

Load/save parameters: + new configuration

OK Cancel

The report lists the total value of the units, the number of titles and units, and the number of units in which the price is not entered.

COBISS Cooperative Online Bibliographic System & Services COBISS	
████████████████████	21-May-2025
<b>H – LIST OF MATERIAL</b>	
<b>HOLDINGS WITH DATE OF ACCESSIONING</b>	
Purchase from Nov *24 to today	Report code: H-BD-B01
← Comment in the Title	
<hr/>	
Prices - total in domestic currency:	EUR 1,171.40
Number of titles:	61
Total number of units:	64
Number of units not entered into 996/9973 – 2	
Price:	

#### 4.14 Number of fields 996/997 (units) by location or by location and date of accessioning or acquisition type

Postopek je enak, kot je opisano v točki [4.13](#). Spreminjamo samo **Parametre za pripravo izpisa**, ki jih določimo v iskalniku **Polje 996/997**.

#### 4.15 Število polj 996/997 (neodpisanih) v določenem časovnem obdobju na določeni lokaciji in njihova skupna vrednost

Podatek o številu enot pridobimo na enak način, kot je opisano v točki [2.8](#). Spreminjamo samo poizvedbo, ki jo določimo v iskalniku **Polje 996/997**.

Podatek o vrednosti teh enot najhitreje pridobimo z izpisom **Z-PL-B08: Rekapitulacija podatkov o zalogi**. Postopek je opisan v točki [4.13](#).

#### 4.16 Število vseh odpisanih polj 996/997 v knjižnici

Število odpisanih enot najhitreje ugotovimo s pomočjo iskalnika **Polje 996/997**. Uporabimo atribut za iskanje **Status (q)** in izberemo vrednost **9 – odpisano**.

## 4.17 Število odpisanih polj v določenem časovnem obdobju na določeni lokaciji in njihova skupna vrednost

Podatek pridobimo enako, kot je opisano v točki [4.16.](#), s tem da dodamo še iskalni atribut **Datum inventariz. (o)**.

Podatek o vrednosti teh enot najhitreje pridobimo z izpisom **Z-PL-B08: Rekapitulacija podatkov o zalogi**. Postopek je opisan v točki [4.13.](#)