

## 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 informacijske sisteme in informacijske 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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## **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.

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Active search	Control pa	nel Field 996/9	997 <b>H</b> ×						
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Acquisitions									
Serials	Field 996/9	97 ~	UDC open	access (d\u)	× = ×		~	+ 0	
Electronic	Field 996/9	97 ~	Sublocatio	n (d\l)	~ = ~	0 - Splošno	÷	=>	
resources	Sort by: De	fault	~ 11			02 - Knjižničarstvo	queries	~ 0	
Holdings						1 - Filozofija			
Loan	/	+ 100	☆ 🛄	No. of hits: 25.	.758	159.9 - Psihologija			
Interlibrary	Cur	Shelving i \$	Call numb 🗘	Accession \$	Date of ac \$	S 2 - Verstvo	vailabilit 💠	Acquisitio \$	\$
loan	1	2 - Arrangeme	IK\uVT\aMAS	10000001	03-Nov-2017		- limited acc	a - purchase	
Settings and	2	2 - Arrangeme	IK\uVT\aMAS	10000002	03-Nov-2017	3 - Družbene vede		a - purchase	
	3	2 - Arrangeme	IK\uVT\aMAS	10000003	03-Nov-2017	37 - Izobraževanje, šolstvo		a - purchase	
Reports	4	2 - Arrangeme	IK\uVT\aMAS	10000004	03-Nov-2017	39 - Narodoslovie		a - purchase	
	5	2 - Arrangeme	IK\uVT\aMAS	10000005	03-Nov-2017	etnologija		a - purchase	
	6	2 - Arrangeme	IK\u82=30\aN	10000006	03-Nov-2017	5 - Naravoslovne vede		a - purchase	
	7	2 - Arrangeme	IK\u82=30\aN	10000007	03-Nov-2017	504 - Ekologija		a - purchase	
	8	2 - Arrangeme	IK\u82=30\aB	10000008	03-Nov-2017	E1 Matamatika		a - purchase	
	9	2 - Arrangeme	IK\u82=30\aB	10000009	03-Nov-2017	51 - Matematika		a - purchase	
	10	2 - Arrangeme	IK\u0\aNEVEF	100000010	03-Nov-2017	52 - Astronomija		c - gift	
	11	2 - Arrangeme	IK\uM\aBOYN	100000011	03-Nov-2017	53 - Fizika		a - purchase	
	12	2 - Arrangeme	IK\uM\aROSS,	100000012	03-Nov-2017	54 - Kemija		a - purchase	
	13	2 - Arrangeme	IK\uP\aRIDDE	10000013	03-Nov-2017		~	a - purchase	

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

O COBISS Lib -			2 Q Q – O X
= CL COBISSLib		/ 01 Knjižnica 🛔	<ul> <li>Э ☆ </li> <li>↓ ▲ </li> <li>↓ ♀</li> <li>↓ ♀</li></ul>
<ul> <li>Active search windows</li> <li>€ Acquisitions</li> <li>B Serials</li> <li>E Electronic resources</li> <li>Holdings</li> <li>Loan</li> <li>Interlibrary loan</li> <li>Settings and administration</li> <li>Reports</li> </ul>	Here       Home library         • Time parameters         ?       P Partner +         3       • • • • • • • • • • • • • • • • • • •	Settings     Coal code lists     Oucue editor     Ou	Server     Orhange passwords     Orhange passwords     Show server errors     Show server errors     Show server errors     Show torthies log     System properties     Server Information     show logged in system users     Set the login level     Connection with COBISS IO

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.

Local code lists ×
Local code lists
Format (CODE 81)
Processing type - directing (CODE 82)
CODE 83
Sublocation (CODE 84)
UDC for statistics (CODE 85)
Shelving location (CODE 86)
UDC group (CODE 87)
Recipient (CODE 88)
UDC open access (CODE 89)
CODE 90
Supplier (CODE 91)
Financier (CODE 92)
CODE 93
Principal activity (ISBN/ISMN) - publishers (CODE 94)
Departments (CODE 301)
Institutions, companies (CODE 303)
Department of employment (CODE 306)
Code list of tax groups (CODE 307)
Code list of faculties (CODE 308)
Class, class teacher (CODE 310)
Mobile library stop (CODE 311)
01 1 (0005.010)
Edit Close

#### **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.

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								👗 s	ys_alenka	ilm 🗭
	Active search windows Acquisitions Serials Electronic resources Holdings Loan Interlibrary Dean Settings and administration Reports	Home library     o Time parameters      Partner +      G Contact      Outer      Could      User      Could      Could      Settings      Local code lists      Ouve editor      Job editor      User settings      User settings      User settings      Locial definations      Locial definations      Could definations      Set date for loon procedures      Set up shortcuts for procedures      Set up shortcuts for procedures      Profiles – view, edit	oned material	7 Me Messages O Send a mes Read last m O Prepare COI 8 Server O Change pas 0 Refresh sett O Show activit O Show activit O Show activit O Show activit O Show activit O Show logge O Connection	issage to all users heissage BISS+ notification issueds tings remote lieslog tielslog heiss mation d in system use n level with COBISS IO	s m rs				

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.

O COBISS Lib -		₽ @ … – □ ×
= CC COBISS Lib	/ 01 Knjižnica 👗	ව ☆ 🔎 🛆 🌲 🚭 ? O ≛ sys_alenkalm 🗭
Active search windows  Acquisitions  Acquisitions  Acquisitions  Acquisitions  P Partner +  Electronic resources Holdings Loan	6 Se Settings Oucue editor Oucue editor Oucue editor User settings Oucue destinations Oucue destina	8 Se Server • Change passwords • Refresh settings • Show server errors • Show server errors • Show server information • Show logged in system users • Set the login level • Connection with COBISS IO or COBISS DGW
Interlibrary Ioan CollB	7 Me Messages O Send a message to all users O Read last message O Prepare COBISS Plus notification	

In the window that opens, use the Add button.

Shor	tcuts editor fo	r procedures				×
ist of	active shortcuts to	procedures				
	Shortcut desig	Procedure name				
			Add	Edit	Delete	Exit
			Add	Edit	Delete	EXIL

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

Edit procedure	×
Procedure name	List of procedures
Unavailable material / Return/Delete	Material / Download record from COBIB
Procedure label	Material / Catalogue
RET	Member / Card
	Member / Enter visit
	Field 996/997 / View
$\mathbf{\lambda}$	✓ 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
	<b>OK</b> Cancel

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

Shortcuts	editor fo		×		
List of active	shortcuts to	procedures			
Shor	tcut desig	Procedure name			
RET		Unavailable material /	Return/Delete		

Instructions for setting up shortcut buttons: <u>4.1 Setting shortcuts for performing procedures</u>.

#### **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).

tofa	active shortcuts to	procedures	
	Shortcut desig	Procedure name	
	RET	Unavailable material / Return/Delete	

#### **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).

0	CC	DBISS Lib -		Q	5	]		_		×
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		search windows	2 RET							
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		Serials	Accession number (f) or expert search or keywords			×	0		Q	
	<b>P</b>	Electronic resources	Field 996/997 V COBISS.SI-ID V = V			20		+	8	۹
	ō	Holdings	Field 996/997	~		×		=>		
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	¢\$	Settings and administration	Cur. Shelving i ¢ Call numb ¢ Accession ¢ Date of ac ¢ Status (q) ¢ Status dat ¢ Availabilit ¢	Acq	uisiti	io ¢	Supp	lier (2)	¢ Pr	ce (3
		Desceta	Image: 1         2 - Arrangeme         IK\uVT\aMAS         10000001         03-Nov-2017         03-Nov-2017         1 - limited acc	a -	purc	hase	Ajda	1	E	JR 1:
	•	Reports	2 2 - Arrangeme IK\uVT\aMAS 10000002 03-Nov-2017 03-Nov-2017	a -	purc	hase	Ajda	1	E	JR 1:
			3 2 - Arrangeme IK\uVT\aMAS 10000003 03-Nov-2017 03-Nov-2017	a -	purc	hase	Ajda	1	E	JR 1:
			4 2 - Arrangeme IK\uVT\aMAS 10000004 03-Nov-2017 03-Nov-2017	a -	purc	hase	Ajda	1	E	JR 1:
			5         2 - Arrangeme         IK/U91/alWAS         100000005         03-N0V-2017         03-N0V-2017           6         2 - Arrangeme         IK/U92=20\ab         100000005         03-N0V-2017         03-N0V-2017	a -	purc	hase	Ajūs			ID 1(
			7 2-Arrangeme IK/u82=30/alv 10000000 03-Nov-2017 03-Nov-2017	a -	purc	hase			E	
				u	pure				_	
			Copy from another field Accession New pattern Bind issues Unbind issues Delete field Add receiv							
			Show field in the COMADC format Delete field 006, arrested in the accuration presedure Multiply field 006/007	Drint I	label	la.	Entor	anto fo	r loon	
			Show here in the commence format Contract Service here and a so, created in the acquisition procedure Multiply field 330/337	Finti	apel	15	citteri	iote to	riodh	
			Make up a set Show transactions							

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Ū	Holdings	Field 9		- 24		•>	
	Loan	Sort by:		queries	`	~ •	۵
sty.	Interlibrary Ioan						
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	Deserts	<b>2</b> 1		ırchase	Ajda	1	EUR 1:
•	Reports	2		irchase	Ajda	1	EUR 1:
				urchase	Ajda		2UR 1:
				irchase	Ajda		2UR 1:
				urchase	Ajda		
				irchase			EUR 1
		Copy f	∧ ∨ Select Show Rename Delete Close	ie to 'Rec			
		Show	field in the COMARC format Delete field 996, created in the acquisition procedure Multiply field 996/997 Print	labels	Enter note f	for loan	
		Make	up a set Show transactions				

## **1.6** Creating your own queries – "My queries"

You can save queries in all the search windows you use. You do this by first entering the search query and then using the **Save query** button.

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€	Acquisitions	Control pa	nel Field 996/	997 H ×				/				
	Serials	Accession	number (f) or exp	ert search or key	words	NOT	/		20	0	۹	
Ţ	Electronic resources	Field 996/9	97 ~	UDC open	access (d\u)	× - ×	51 - Mate ×	× ~	20	$\smallsetminus$	+ Ø	۹
1	Holdings	Field 996/9	97 ~	Sublocatio	n (d\l)	~ = ~	K - Knjižn ×	× ~	20		=>	
	Loan	Sort by: De	fault	~ 4E				N	ly queries		~ •	٦
5	Interlibrary Ioan	••• Ø	• + 100	☆ 🛄	No. of hits: 18.	515						
0	Settings and	Cur	Shelving i \$	Call numb \$	Accession ¢	Date of ac 💠	Status (q) 💠	Status dat 💠	Availabilit	\$ Ac	quisitio 💠	S
	auministration	1	2 - Arrangeme	IK\u82=20/9\a	100005446	11-Nov-2010		12-Sep-2018		e	- old stock	
₽	Reports	2	2 - Arrangeme	IK\uM\aSIVEC	100007225	07-Nov-2018		07-Nov-2018		c	- gift	
		3	2 - Arrangeme	IK\uM\aSIVEC	100018553	28-May-2025		28-May-2025		c	- gift	
		4	2 - Arrangeme	IK\uM\aSIVEC	100018554	28-May-2025		28-May-2025		c	- gift	
		5	2 - Arrangeme	IK\uM\aSIVEC	100018555	28-May-2025		28-May-2025		c	- gift	
		6	2 - Arrangeme	IK\uM\aSIVEC	100018556	28-May-2025		28-May-2025		c	- gift	
		7	2 - Arrangeme	IK\uM\aSIVEC	100018557	28-May-2025		28-May-2025		c	- gift	

A window will open for entering the query name.

Query		×
Query name		
Matematika - knjižnica		
	ОК	Cancel

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

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₽	Reports								

### **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: $\neg * \emptyset$

=  $\rightarrow$  Not an operator. This is the default search by the attribute value entered in the search window.  $\neg$   $\rightarrow$  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-accessioned material from the search.

Control panel Field 996/997	TH ×					
Accession number (f) or expert	search or keywords			×	0	Q
Field 996/997 ~	Status (q)	~ - ~	9 - de-accessioned $\times$	× ~ 🛛	+	Ø 9
Field 996/997 ~	Sublocation (d\l)	~ = ~		~ ×	=>	
Sort by: Default	✓ 1≣.			My queri	es 🗸	۵
••• 🖋 👁 + 100						
Cur Shelving i 🛊 Ca	II numb 🛊 Accession 🛊	Date of ac 🖨	Status (q) 🗢 Status dat 💠	Availabilit 🛊	Acquisitio \$	Supplier (2)

\*  $\rightarrow$  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.

Control panel Field 996/997 H			
Accession number (f) or expert search or keywords	×	0	٩
Field 996/997 Votes (r) × × V	5. 2 2 S	+	Ø 9
Field 996/997         V         Sublocation (d\l)         =         V	20	=>	
Sort by: Default ~ L	y queries	~	۵
••• 🖋 🐵 + 100 🔂 🏢			
Cur Shelving i + Call numb + Accession + Date of ac + Status (q) + Status dat + Availabit	ilit 💲 Ac	quisitio 💠	Supplier (2)

 $\emptyset \rightarrow$  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.

Accession number (f) or expert search or keywords     Field 996/997     Price (3)     Ø     Field 996/997     Sort by:     Default     Image: state										н×	6/997	ield 996	nel F	trol par	Con
Field 996/997       Y       Price (3)       Y       Ø       Y         Field 996/997       Y       Sublocation (d\l)       Y       =       Y       Y         Sort by:       Default       Y       Image: Comparison of the second se	Q		0	×					ywords	earch or ke	xpert	(f) or ex	number	ssion r	Acce
Field 996/997       Sublocation (d\l)       = -       -       X         Sort by:       Default       -       I       My queries	<i>.</i>	+		$\sum_{i=1}^{n}$				ø v		Price (3)	~		97	996/9	Field
Sort by: Default ~ Li My queries		=>		$\mathbf{X}$	~			= ~	on (d\l)	Sublocatio	~		97	996/9	Field
••• 🖋 👁 +100 🏠 🏢	•	~	S	ueries	My qu					- 4E	``		fault	y: De	Sort by
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## 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.

= CL	COBISS Lib			Field 996/997							×
				Sublocation (d\l)		1 - limited acces	~				
Active		OFT		K - Knjižnica#01	~	Statue (a)					
searc windo	h ⊠ !	REI		Shelving location (d\i)		Status (4)				~	
E Acqui	Co	ntrol par	nei		~	Status data (t)					
e Acqui			1	Format (d\f)		Status date (t)					
Serial	s Acc	ession n	iumbe		~	03.11.2017				-	
Electr	onic	d 006/00		Counter for running No.		Loan restriction (u)					
resou	rces	u 990/99	1	provident and a control of control of CASING \$1,00,012	~						
Holdi	ngs Fiel	d 996/99	7	Running number (d\n)		Counter for loan nur	mbers				
E Loan	Sort I	by: Def	ault	running number (a bij						~	
Interli	brary		1	Numberies (d) a)		Loan No. (9)					
loan		1	۲	Numbering (u\s)							
Settin admin	gs and	pur	Shelv			Notes (n)					
		1	2-4	UDC open access (d\u)						1	
Repor		2	2-1	VT - velike tiskane črke	~	Notes (r)					
		3	2-4	Author or title (d\a)						1	
		4	2-4	MASTERL Š., M.		Acq. data					
		5	2-1	Title (d\5)		4: a - purchase:				×	
		0	2-1	Zakaj se		Field 009		- L			
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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.

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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 helps you with this. A document with instructions is available on our website: <u>Installing the COBISS IO aplication</u>. 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**.

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	Copy from another field Accession New pattern Rind issues Unbind issues Delete	field				
	Add received issue to 'Recently received material' Show field in the COMARC format					
	Delete field 996, created in the acquisition procedure Multiply field 996/997 Print labels Enter	er note f	or loan	Make up a	a set	
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## 2.5 De-accessioning material

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

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00	Settings and administration	UDC open access (d\u)		1	
<b>-</b>	Reports	61 - Medicina Author or title (d\a) ZITTLAU, J. Acc. data	ING	1	
		COMARC Define numbers Copy	Print labels	OK Can	icel

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.

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€	Active search windows Acquisitions	Mt Material + Download record from COBIB Search for material without bibliographic record Serials check-in Catalogue De-accessioning	6 N Recently receiver	I material ns for requestors about received material
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N (*)	Loan Interlibrary Ioan Settings and administration	DE-ACCESSIONING <     De-ACCESSIONING <     Accession number (f)     Change the following dat:     Change call number     Show available numbers     De accession the materia	20250529 sys_alenkalm>	
4	Reports	Oreactession the Internet     Oreactession the Internet     Oreactession the Internet     Templates for adding field 990/997     Enter transaction with material in reading room     View     Add/remove material for reading sets     Show log of changes in data     De-accession textbooks     Send from report queue     Prepare holdings data statistics	Continue Finish	rial entered + ional material

## 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).

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		Copy from another field Accession New pattern Bind issues Unbind issues De	elete field
		Add received issue to 'Recently received material' Show field in the COMARC format	
		Delete field 996, created in the acquisition procedure Multiply field 996/997 Print labels	Enter note for loan Make up a set
		Show transactions	

#### 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.

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	Reports	4         2 - Arrangeme         IK\iUG\uSU\al         100015419         11-Nov-2010         26-Mar-2020           5         2 - Arrangeme         IK\iUG\uSU\al         100002020         11 Nov-2010         26-Mar-2020			e - old s	stock		
		5         2 - Arrangeme         IK\UG\USU\ai         100003993         11-Nov-2010         02-Jul-2018           6         2 - Arrangeme         IK\UG\USU\ai         100015432         11-Nov-2010         26-Mar-2020			e - old s e - old s	stock		
		7         2 - Arrangeme         IK\iUG\uSU\al         100015433         11-Nov-2010         26-Mar-2020			e - old s	stock		
		8         2 - Arrangeme         IK\iUG\uSU\af         100004870         11-Nov-2010         29-Aug-2018			e - old s	stock		
		9 2 - Arrangeme IK\iUG\uSU\a. 100015221 11-Nov-2010 20-Mar-2020			e - old s	stock		

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

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	2	2 - Arrangeme	IK (IUG (USU (a)	100010850	11-Api-202	2	11-Api-2022		C - gi	۰.

# 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).

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		3	2 - Arrange	ne IK\as	TEVENS	100018168	27-Mar-2025		27-Mar-2025			a - pu	ırchase	
		4	2 - Arrange	ne IK\u8	2=20/9\a	100005446	11-Nov-2010		12-Sep-2018			e - ol	d stock	
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		6	2 - Arrange	ne IK\u8	2=20/4\a	100006094	11-Nov-2010		11-Oct-2018			e - ol	d stock	
		7	2 - Arrange	ne IK\u8	2=20/4\	100006095	11-Nov-2010		11-Oct-2018			e - ol	d stock	
		8	2 - Arrange	ne IK\u8	2=20/4\a	100006096	11-Nov-2010		11-Oct-2018			e - ol	d stock	

## 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).

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0	Settings and administration	2	2 - Arrangeme	IK\u39\aBOG/	10000000	19-M	ay-2020		19-May-202	0			a - pur	chase	Α
		3	2 - Arrangeme	IK\uVT\aMAS	100000001	03-No	ov-2017		03-Nov-2017	7			a - pur	chase	Α
-	Reports	4	2 - Arrangeme	IK\uVT\aMAS	10000002	03-No	v-2017		03-Nov-2017	7			a - pur	chase	Α
		5	2 - Arrangeme	IK\uVT\aMAS	10000003	03-No	ov-2017		03-Nov-2017	7			a - pur	chase	A
		6	2 - Arrangeme	IK\uVT\aMAS	10000004	03-No	v-2017		03-Nov-2017	7			a - pur	chase	Α
		7	2 - Arrangeme	IK\uVT\aMAS	10000005	03-No	v-2017		03-Nov-2017	7			a - pur	chase	Α

## **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)



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

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	2	0000049						female				002 - prima
	3	0000083						male				002 - prima
	4	0000005						famala				000

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.

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ē	Holdings	For interval search, use the character *.* (e.g. 1000:5000)			
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		▶ 3.			
		Overdue notices - overview Change of membership card number Delete member details Show routing details for the member	Show transac	ctions	
		Print label for membership card Lending form Archive of e-documents			

#### **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.

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		Print label	for membersh	ip card	Lendir		Archive		nts								

## **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.

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			👗 sys.
88	Active search windows	Ma Member +	7 HL Home library
€	Acquisitions	Card     Notify member about a routing period expiry     Send general notification	<ul> <li>Time parameters</li> <li>Calendar</li> <li>Loan type (pg table)</li> </ul>
	Serials	Show available numbers     Change class/grade     Change class/grade	Electronic notification     Contact details and information for COBISS+     Destrictions on sensitives
P	Electronic resources	Delete inactive members     Delete selected inactive members     Cancel deletion of inactive members	Show loan parameters     Create lending forms and invoices
Ō	Holdings	Delete notes for inactive members     Enter visit     Image: Instance definition of the second	Expand username code list for reports     Text for signature pad
	Loan	Enter/update members details – school libraries     Update member details – export     Update member details – import	8 DP Department
00	Settings and administration	Send from report queue	• Card
₽	Reports	P Partner +	Ms Notification
		3 Mt Material +	<ul> <li>Send special notification</li> </ul>
		Catalogue     COBISS+     View loans and de-accessioning from textbook fund     Display of data about the access to full text of the e-resource	N         Overdue notices           • Create overdue notices         • Cancel creation of overdue notices           • Send overdue notices         • Send overdue notices
		Field 996/997     Enter transaction with material in reading room     View     Add/remove material for reading sets	o Create overdue notice forms
		De-accession textbooks     Prepare holdings data statistics	12 RI Routing lists +

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### 3.5 Printing a membership card label

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

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		Guardian/guarantor Date of last visit
		07.12.2015
		Label Note Password E-notification Registration form OK Cancel
	Overdue notices - overview Change	e of membership card number Delete member details Show routing details for the member Show transactions
	Print label for membership card Le	anding form Archive of e-documents

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.

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		Print label f	or membership c	ard Lendi	ng form A	rchive o	of e-docu	men	ts								

#### **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.

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Ō	Holdings	Delete inactive members     Delete selected inactive members     Cancel deletion of inactive members	0	Restrictions on operations Show loan parameters Create leaving forms and involves	
	Loan	<ul> <li>Delete notes for inactive members</li> <li>Enter visit</li> </ul>	0	Expand username code list for reports     Text for signature pad	
49y	loan Settings and	Import e-documents     Enter/update members details – school libraries     Update member details – export	8	December 1	
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		<ul> <li>Catalogue</li> <li>COBISS+</li> </ul>	Nt	Overdue notices	
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			0	Create overdue notices	
		H Field 996/997			
		<ul> <li>Enter transaction with material in reading room</li> <li>View</li> </ul>	11	Counter-	
		<ul> <li>Add/remove material for reading sets</li> </ul>	No	Counters	
		<ul> <li>De-accession textbooks</li> </ul>	12		
		<ul> <li>Prepare holdings data statistics</li> </ul>	RI	Routing lists +	

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.

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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.

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## 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.

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

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## 3.10 Change of due date

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

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



## 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.

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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.

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$Q_0^0$	Settings and administration		Cur	Members.	. 0 F	irst name o	Sumame e	Date o	Search by key	Name of
₽	Reports			134/408		vateja	lest		Membership card number/keywords:	Usnovni
						/			OK Cancel	
		Ove	rdue na	otices - over	view	Change of r	nembership c	ard number	er Delete member details Show routing details for the member Show transactions Print label for membership card	Lending for
		Arc	hive of	e-document	s					

#### 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.

COBISS	Lib	/ 01 Knjižnica	<b></b> © 1	
Active search windows	🖴 Bib 📦 Cat 📧 Card 😤 Mem 🕑 Viev	v		
Acquisitions	Mb Member +	4 Field 996/997	HL Home library	No Counters
<ul> <li>Serials</li> <li>Electronic resources</li> <li>Holdings</li> <li>Loan</li> <li>Interlibrary loan</li> <li>Settings and administration</li> </ul>	Card Card Notly member about a routing period expiry Send general notification Show available numbers Change classryme Delete inactive members Delete is selected inactive members Cancel deletion of inactive members Delete notes for inactive members Enter visit Import edocuments Entervipate member details – export Update member details – moport Seden tomes for inactive members	O Exercipansaction with material in reading room     O View View (At C)     O Add/renow material for reading sets     De-accession textbooks     De-accession textbooks     Prepare holdings data statistics      Wuravailable material     Return/Delete     Delete explice fear-avions     Material loan analysis     Calculate material turnover     Return with restriction	Chime parameters     Calendar     Calendar     Calendar     Loan type (pq table)     Electionic notification     Contact Cellisa and information for COBISS+     Restrictions on operations     Show loan parameters     Create lending forms and involces     Expand userame code last for reports     Text for signature pad      Department     Card	Routing lists +     Routing lists +     Routing     Routing     Pouting     Pouting
keports	2 P Partner + 3 Material + Catalogue COBISS+ Office loss and de-accessioning from textbook fund Display of data about the access to full text of the e-resource	Prepare non unnancion statutes     Monitoring and processing reservations of     available material	Motification     Show undelivered e-notifications     Send special notification      Create overdue notices     Create overdue notices     Send overdue notices     Send overdue notices     Create overdue notices     Create overdue notices	16 Equipment transactions 17 Equipment counters

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.

Active search	<b>표 Bib 및 Cat @ Card 볼 Mem @ View</b>	/ 02 Učbeniški skla	d 🚠 🔊 🗹	
windows Acquisitions	1 Mg Member +	4 H Field 996/997	7 HL Home library	11 No Counters
Serials Electronic resources	Card     Notify member about a routing period expiry     Send general notification     Show available numbers     Change class/grade     Delete inactive members	Enter transaction with material in reading room     View     Add/remove material for reading sets     De-accession textbooks     Prepare holdings data statistics	Time parameters     Calendar     Loan type (pg table)     Electronic notification     Contact details and information for COBISS+     Restrictions on operations	12 RI Routing lists + 13 Rt Routing
Loan Interlibrary Ioan Settings and administration	O Delete selected inactive members     O Delete selected inactive members     O Delete notes for inactive members     O Delete notes for inactive members     O Ingort e-decuments     O Enter/update member details - school libraries     Update member details - import     O Selection of thom report queue	5 Im Unavailable material Return/Delete Delete expired reservations Material loan analysis Calculate a typical work week Calculate a typical work week Calculate a twice material tumover Return with restriction Calculate and the struction Calculate and th	Show loan parameters     Grate Lending forms and invoices     Grate Lending forms and invoices     Expand username code list for reports     Text for signature pad	Catalogue
керопз	2 P Partner + 3 Mt Material + Cotalogue COBISS View loans at de accessioning from textbook fund Display of data about the access to full text of the e-resource	C Prepare roan transactions statistics     C    C		16 R Equipment transactions 17 R Equipment counters

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.

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	Active search		•	Bib	Cat	Card	🖶 Mem	Ø Vie	w																
v I A	Acquisitio	Cata	logue	e														×			11	vre			
] s	Serials	sond	e na ki	rasu										20	0		Q				12	10			
E	Electronic	Field	996/9	197	~	Lending	department	~		~			~			+		ς			RI Routin	g lists	+		
•	loldings	Field	996/9	197	~	Accessi	on number (f)	~	-	~	000011147			×		=>			n for COBISS+		Rt Routin	9			
l I	oan	Field	996/9	197	~	Subloca	tion (d\l)	~	-	~			~	20					ces reports	<b>a</b>	14 Equipr	nent -			
	nterlibrary oan						A	vailable	9				Му	queries		~	۰	3			O Catalo	gue			
0, 00	Settings a administra		۲	No. of	hits: 1																15 Im Unava	lable eq	uipmer	nt	
F	Reports		Cur	Title ¢	na Kras	Author ÷	Accession	¢ Ci	all nu	mber ÷	Loan status / Issues	e e	2025	Mombo	C	OBISS-)	( ¢	Public			O Return	/Delete			
				Jonice		Noauvel, are	000011147	K		JUVEL		an, due date. 02.00.	20237	Wernbe	1.00	200200	112	2004			16 Equipr	nent trai	nsactio	ns	
																			15		17	ant cou	intere		
																					Eduibi	ient cou	inters		
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				/																					
		Vie	w	Print sli	р																				
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#### 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.

Active search windows	🖶 Bib 📦 Cat 🖲 Card 👹 Mem  View			
<ul> <li>Acquisitions</li> <li>Serials</li> <li>Electronics resources</li> <li>Holdings</li> <li>Loan</li> <li>Settings and administration</li> </ul>	Member         +           Card         -           Notify member about a routing period expiry         -           Show available numbers         -           Ohang classrygrade         -           Delete inactive members         -           Delete solected inactive members         -           Delete notes for inactive members         -           Delete notes for inactive members         -           Delete rotes in the source of the sole of	Field 996/997     Enter transform with material in reading room     Enter transform with material in reading room     Addremow manerator reading sets     Desceesion textbooks     Prepare holding data statistics	Home library     Time parameters     Calendar     Calendar     Calendar     Control (Constraint)     Control (Constraint)     Control (Constraint)     Control (Constraint)     Constraint (Constraint)     Constraint (Constraint)     Constraint (Constraint)     Constraint)     Const	11 12 13 14 14 15 15 10 15 11 10 11 12 13 14 14 14 14 15 15 15 15 15 15 16 17 17 18 18 18 18 18 18 18 18 18 18
Reports	Send from report queue      Pertner +      Catalogue     CoBISS+     View loans and de-accessioning from textbook     fund     O Display of data about the access to full text of the     e-resource	Prepare loan transactions statistics     Prepare loan transactions statistics     Monitoring and processing location     Monitoring and processing reservations of     available material	Casis     C	o Return/Delete

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.

1	CC COBISS	Lib	/ 01 Knjižnica 🚠	ອ	\$		0	?	0 🛔 sy
88	Active search windows	🚘 Bib 🖣 Cat 🗃 Card 👹 Mem 🕑 Vi	iew						
€	Acquisitions	Control panel Field 996/997 H							
	Serials	Accession number (f) or expert search or keywords						×	0
Q	Electronic resources	Field 996/997 Y COBISS SLID		1					
0	Holdings	Field 996/997 Sublocation (d\l)	nsight into the library material status ×				~	*	-
N	Loan	irt by: Default 🗸 📔	I=Sonce na Krasu				My d	queries	
(1)	Interlibrary Ioan	···· 》 ● +100 ☆ 開 し	Y=2004 Asslv - Slovenian						
00	Settings and administration	Cur Shelving i + Call numb + Accest	4=000011147 SG=K P KOSOVEL SREČKO Sonce na Krasu I 19-May-2025 02-Jun-2025 C tember: 0000038 BRIGITA TEST, 006 - employees	2)	i) ÷ i	Physical f 🛊	Copy/s	set i 💠	Binding in
0	Reports	✓ 1 2 - Arrangeme IK\f1\uP\aKO: 0000*		EUR 5,	99				Not defin
		Copy from another field Accession New patter Delete field 996, created in the acquisition procedure	C Cancel C Cancel Multiply field 996/997 Primt Labels Enter note for loan Make up a set Show	ved material" transactions	Show 1	field in the COM	MARC fo	ormat	

## **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).

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Active search	📾 Bib 🗣 Cat 😂 Card 🞽 Mem 🛛 View		
Acquisitions	Favourites Reports Bibliographies Report variables Classific	ations Data export	
Serials	Standard Reports: Members and material	×	
Electronic resources	Report definitions		
Holdings	o Data for o Lists	Enter parameters for report creation	
Loan Interlibrary	2 LOAN-MM-01: Members with entered material LOAN-MM-02: Material by status	Query parameters	
Settings and administration	Lists     LOAN-MM-03: Members and loan period date about to ex     O Use of f     LOAN-MM-04: Notification about a loan period expiry date     Statistic	prie <sup>(</sup> /// Unavailable material Expling period *: = ~	
Reports	LOAN-MM-05: Notification about a loan period expiry date LOAN-MM-06: Recipients of e-mail notification	P (0- From: 01.05.2025 📰 To: 16.05.2025 📰 💥	
	Serials     LOAN-MM-07: List of reserved material     LOAN-MM-08: Number of members of individual categori     LOAN-MM-08: Number of members of individual categori	Unavailable material Library department: =	Contra State
	<ul> <li>Statistic LOAN-MM-09: Members and loan period date about to ex LOAN-MM-10: List of borrowed textbooks by department</li> </ul>	ptre Member Member category: = V 001-preschool children X   X V );;	٦
	Electror     O Lists     O Use of fi	for Member Course of study: =	8
	O Statistic     O Data for	OK C	lano
	Holding Delete stored reports Browse stored reports	Add to favourities Create scheduled report Create report Close	
	Ouce of Francela means     Ouce of Francela means     Ouce of Francela means     Ouce of Francela means     Ouce of Construction     Ouce of Constructio     Ouce of Construction     Ouce of C	naterial	

## 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.

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8	Active search windows	🗃 Bib 📦 Cat 📧 Card	😁 Mem	ØV	/iew														
	Acquisitions	Favourites Reports Biblio	ographies	Report v	rariables	Classi	ificatio	ns Data e	export										
	Serials	Standard User definitions																	
į	Electronic	0	Reports:	Membe	ers an	d materi	al											×	
1	Holdings	Cataloguing O Data for further processing	Report defini	tions															
	Loan	o Lists	Q																
D7	Interlibrary	2 C Acquisitions	LOAN-MM	-01: Merr	nbers wi	th entered	materi	al											
200	Settings and administration	O Lists O Use of financial means O Statistics	LOAN-MN	Search	h - Me	mber												×	
6	Reports	1	LOAN-MA	Membe	ership c	ard numbe	r or kej	words									Q		1
		Serials O Lists	LOAN-MIN	Membe	er		~	Class/gra	de	~ =	- v	1.8 -	×	× ~	2			q	ī
		<ul> <li>Use of financial means</li> <li>Statistics</li> </ul>	LOAN-MIN	Membe	er		~	Members	hip card numbe	~ .	~	For interva	I search, use the o	haracter "	5	:			1
		4	LOAN-MI	Sort by:	Defau	lt	,	< 11.						М	ly quer	ies `	•	8	
		Electronic resources     Lists	LOAN-MIN		۲	+ 100	\$	No. o	f hits: 25										
		Statistics     Date for further procession			Dur N	lembers	o Fir	st name o	Surname o	Date of	bi ¢	Gender o	Permanen o	Municipal	l o	Member c o	Guardia	n/	l
		C Data for farmer processing		1	1 1	347556						female				002 - primary			
		5 Holdings		2	2 1	347599						male				002 - primary			
		o Lists	-	3	3 1	347600						male				002 - primary			
		Use of financial means     Rusiness documents	Delete st	4	4 1	347601	_					male				002 - primary			
		o Statistics		5	5 1	347602	_					male				002 - primary	1		
		<ul> <li>From archived file</li> <li>Statistics (user classificatio</li> <li>From archived file</li> </ul>	ons)											e e		Select	all C	lose	

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		Enter parameters for	report creation				×
88	Act sea win	Query parameters					
€	Acc	Unavailable material	Date of loan or reservation:	=	~	From: 01.01.2025 🛗 To: 30.04.2025 🛗	×
	Ser	Unavailable material	Author:	=	~		×
₽	Ele	Unavailable material	Call number:	=	~		22
Ō	Hol	Unavailable material	Availability level:	=	~	~	×
	Loa	Unavailable material	Status:	=	~	~	20
5	Inte Ioai	Unavailable material	Loan restriction:	=	~		22
<b>Q</b> <sup>0</sup>	Set	Unavailable material	Note on item:	=	~		20
	Rer	Unavailable material	Temporary note:	=	~		20
		Unavailable material	Type of material:	=	~	~	х.
		Unavailable material	Transaction department:	=	~	~	20
		Unavailable material	Loan status *:	=	~	c - on loan $\times$ $ $ k - in circulation $\times$ $ $ s - on loan (reading room) $\times$ $ $ $\times$ $ $ $\checkmark$	х.
		Load/save parameters:	+ new configuration			~ 0 ×	
						ок	Cancel
		5					

## 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 <u>LOAN-MM-01</u>: <u>Members with entered material</u>.

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

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Active search windows	📾 Bib 📦 Cat 🗃 Card 👹 M	em 🕑 View				
€ Acquisitions	Favourites Prosts Piblic conductor	preport creation	D.+-	- excessed		*
Serials	Standard					
Electronic resources	Query parameters					×
Holdings	o Data for Unavailable material	Date of loan or reservation:	= ~	From: 01.09.2024 🗰 To: 01.09.2024 🚞		×
Evan	Lists     Unavailable material	Author:	= ~			×
Interlibrary	C Acquisi Unavailable material	Call number:	= ~			x
Settings and	Lists     Unavailable material	Availability level:	= ~		~	×
administration	Statistic     Unavailable material	Status:	= ~		~	x
Reports	3 Unavailable material	Loan restriction:	= ~			×
	Lists     Unavailable material     Use of fi	Note on item:	= ~			×
	Statistic     Unavailable material	Temporary note:	= ~			×
	4 Unavailable material	Type of material:	= ~		~	×
	Lists     Unavailable material	Transaction department:	= ~	01 - Knjižnica ×	× ~	×
	o Statistic Unavailable material	Loan status *:	= ~	s - on loan (reading room) $\times$ $$ c - on loan $\times$ $$ k - in circulation $\times$	× ~	×
	5 Load/save parameters	+ new configuration		~	<b>c</b> ×	8
	O Use of fi O Busines				OK	Cancel t Close
	Statistics     From archived file     Statistics (user classifications)     From archived file	o statistics				

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

The procedure is described in section <u>4.1</u>. Use the report <u>LOAN-MM-03: Members and loan period</u> <u>date about to expire</u>, 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 <u>4.2</u>. In the report <u>LOAN-MM-01: Members with entered</u> <u>material</u> 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	r report creation				×
Query parameters					
Unavailable material	Date of loan or reservation:	=	~	From: 01.09.2024 🛗 To: 15.06.2025	
Unavailable material	Author:	=	~	X	
Unavailable material	Call number:	=	~	×	
Unavailable material	Availability level:	=	~	× X	
Unavailable material	Status:	=	~	× X	
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			~ C × 🖻	
				OK Cance	el

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

Prepare it in the same way as in section <u>4.2</u>. In the report <u>LOAN-MM-01: Members with entered</u> <u>material</u>, 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 <u>4.2</u>. In the report <u>LOAN-MM-01: Members with entered</u> <u>material</u>, 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 <u>4.1</u>. Use the report <u>LOAN-MM-03: Members and loan</u> <u>period date about to expire</u>, 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 <u>4.1</u>. Use the report <u>LOAN-MM-03: Members and loan period</u> <u>date about to expire</u>, 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 <u>*H-L-01: Accession book*</u> can be found in **Holdings** in the Lists group.

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Active search window	e 💼 Bib 📦 Cat 🗃 Card 👹 Men	n 🛛 View	
E Acquis	sitions Favourites Reports Bibliographies	Report variables Classifications Data export	
Serials	s Standard User definitions		
Electro resource	onic rces 1 E Cataloguing	6 8 Connection administration	
Loan	C Data for further processing     O Lists	O Members	
Interlib Ioan	2 C Acquisitions O Lists gs and O Use of financial means isitation O statistics	Report definitions	
Report	ts 3 B Serials O Lists O Use of financial means O Statistics	H-L-01: Accession book (search window) H-L-01: Accession book (report with no title) H-L-01: Accession book (report with no title)	
	4 C Electronic resources O Lists O Use of financial means O Statistics	HL-02: List of de-accessioned material HL-02: List of de-accessioned material (search window) HL-03: List of serials (Slovene and other languages) HL-04: List of serials	
	Data for further processing	H-L-05: List of serials by financier H-L-06: List of serials by financier (Slovene and other languages) H-L-07: Data export in MFERAC format (current)	
	Use of financial means     Use of financial means     Usiness documents     Statistics     o From archived file     Statistics (user classifications)     O Error archived file	H-L-09: Export of data in Dublin Core format H-L-09: Export of data in Dublin Core format H-L-10: List of fields 996/997 (full format) Delete stored reports Add to favourites Create scheduled re	port
	O From alchived life	Browse stored reports Create report C	ose

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.

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Active search	🖶 Bib 🐚	Cat 🔳 Card 👹	Mem O View												
€ Acquisitions	Favourites	Reports Bibliograph	nies Report variables Classific	cations	D	nta exp	ort								
Serials	Standard	Reports: Lists									×				
Electronic resources	1	Report definitions													
Holdings	O Data for	۹													
E Loan	© Lists	H-L-01: Accession bo	pok												
Interlibrary	2	H-L-01: Accession be	ook (search window)												
Ioan	© Lists	H-L-01: Accession I	Enter parameters for report	creat	ion									×	
Settings and administration	<ul> <li>Use of fi</li> <li>Statistic</li> </ul>	H-L-01: Accession													-
Reports	3	H-L-02: List of de-a	Query parameters Parameter	S											
_	C Serials	H-L-03: List of seria	Data of accessioning (a) *		~	From	01 02 2025 To: 01 05 2025								
	O Lists	H-L-04: List of seria	Date of accessioning (0) .	-	Ť		01.02.2023						~		
	<ul> <li>Statistic</li> </ul>	H-L-05: List of seria	Accession number exists:	=	~	✓ Ye	is No						×		
	4	H-L-06: List of seria	Accession number range:	=	$\sim$	Fori	interval search, use the character ":" (e,g, 1000:5000)						- 22		
	Electror	H-L-07: Data export	Sublocation (d\l):	=	$\sim$							~	×		
	O Use of fi	H-L-08: Data export	Shelving location (d\i):	=	$\sim$							~	×		
	<ul> <li>Statistic</li> <li>Data for</li> </ul>	H-L-10: List of field	Acquisition type (v):	=	~							~			
	5	H-L-11: List of field	Financias (4):												
	B Holding	Delete stored repo	rmanuel (4).	-	~								- 44		
	<ul> <li>Lists</li> <li>Use of fi</li> <li>Busines</li> <li>Statistic</li> </ul>	inancial means is documents	Load/save parameters: + new c	onfigur	ation			_		~	C	×	l	8	
	O Fro O Statistic O Fro	orn archived file cs (user classifications) orn archived file		_				_				ОК	Can	cel	

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

Reports: Lists					×
Report definitions					
Q	Overview and sending of created report		×		
H-L-01: Accession book					
H-L-01: Accession book (search w	Report: H-L-01: Accession book		<b>D</b>		
H-L-01: Accession book (report wi			<b>,</b>		
H-L-01: Accession book (report wi	✓ H-L-01: Accession book		🗅 🚥		
H-L-02: List of de-accessioned ma	default local printer View	PDF			
H-L-02: List of de-accessioned ma	default local printer				
H-L-03: List of serials (Slovene and					
H-L-04: List of serials					
H-L-05: List of serials by financier					
H-L-06: List of serials by financier	Print				
H-L-07: Data export in MFERAC for					
H-L-08: Data export in MFERAC for					
H-L-09: Export of data in Dublin Co	Save Set starting page No		Send Close		
H-L-10: List of fields 996/997 (full	Save Set starting page No.		Close		
H-I -11: List of fields 998 (full forma	at)	L			
Delete stored reports Browse	stored reports	Add to favourites	Create scheduled repo	rt Create report	Close

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

The report <u>*H-L-01: Accession book (search window)*</u> 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.

Reports: Lists				×	
Report definitions					
Q					
H-L-01: Accession book					
H-L-01: Access?					
H-L-01: Acces: Search - Field 996/997					×
H-L-01: Acces			_		_
H-L-02: List of Accession number (f) or expert search or keywords	20	0		Q	
H-L-02: List of		-			
H-L-03: List of Sublocation (d\l) = K-Knjižnica#01 × × v	r X		+	2	۹
H-L-04: List of Date of accession. (o)	22		=>		- 1
H-L-05: List of Acquisition type (v) = v a - purchase × × ×		×			- 1
H-L-06: List of		_			
H-L-07: Data e Soft by: Default V IE	viy queries		~	•	٩
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H-L-09: Export	Acquis	itio 🚖	Suppl	er (2) 👌	Pri
HL 11:List of 1 2- Arrangeme IK/uP/aVIDM/ 000015945 17-Apr-2025 17-Apr-2025	a - DII	rchase	7410	ŽBA PIV	E
2 2-Arrangeme IK/uCl/aRAD( 000015942 02-Apr-2025 02-Apr-2025	a - pu	rchase	Založ	ba AJDA	E
Delete stored 3 2 - Arrangeme IK\uC1\ašTA\ 000015946 17-Apr-2025 17-Apr-2025	a - pu	rchase	ZALC	ŽBA PIV	E
nancial means	a - pu	rchase	ZVEZ	A MODR	E
s s					
n archived file s (user classificatic					- 1
m archived file	8 Select	🕑 Se	lect all	Clos	e

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

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

The report <u>*H-L-02: List of de-accessioned material*</u> 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.

Reports: Lists									×	
Report definitions										
Q										
H-L-01: Accession book H-L-01: Accession book (	Enter parameters for	report cre	eation							×
H-L-01: Accession book ( H-L-01: Accession book (	Query parameters Pa	arameters								
H-L-02: List of de-access H-L-02: List of de-access	Status (q) 🐪		· · ·	9-de-accessioned $\times$					× ~	20
H-L-03: List of serials (Slo	Status date (t) *: 4		~	From: 01.01.2024	11	To: 30.04.2024	=			00
H-L-04: List of serials	Accession number exist	ts:	· ·	🗹 Yes 🗌 No						00
H-L-05: List of serials by H-L-06: List of serials by	Accession number rang	e:	· ·	For interval search, us	the char	acter ":" (e,g, 1000:500	))			20
H-L-07: Data export in Mi	Sublocation (d\l):		· ~	K-Knjižnica#01 ×					× ~	00
H-L-08: Data export in Mf	Shelving location (d\i):		· ·						~	50
H-L-09: Export of data in H-L-10: List of fields 996,	Date of accessioning (o	):	· ~	From:	=	To:	Π			50
H-L-11: List of fields 998	Accession notes (r):		· ·							20
Delete stored reports										
hancial means documents	Load/save parameters:	+ new confi	guration					$\sim$	c ×	
s m archived file s (user classifications)									ОК	Cancel

You also have a report available for preparing a list of de-accessioned material with a extent determination in the search window <u>*H-L-02: List of de-accessioned material (search window).*</u> The creation method is the same as described in section <u>4.11</u>. 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.

Report definitions	Search - Fiel	d 996/997							_				×
Q	Accession num	nber (f) or expe	ert search or key	words					2	: 0		Q	
H-BD-B01: Holdings wit										_		_	_
H-BD-B02: Holdings wit	Sublocation (d)	\I) 🚩 🗸 🗸	= ~	K - Knjižnica#01	×			×	~ 5	¢	+		۹
H-BD-B04: List of recen	Date of access	sion. (o)	= ~	From: 01.11.2	2024	To:	31.05.2025	<b>**</b>	2	5	=>		
H-BD-B05: Recently rec													
H-BD-B06: List of recen	Acquisition typ	.e (v) 🔦 🗸 🗸	= ~	a - purchase ×				×	~ ?	s ×			
H-BD-B07: List of fields	Sort by: Defaul	lt	<ul> <li>↓E</li> </ul>						My que	ries	~	•	٦
H-BD-B08: Holdings dat													
H-BD-B09: List of de-ac		+100 ☆	No. of	hits: 64									
H-BD-B13: Material for	Cur SI	helving i 🜲	Call numb 🜲	Accession \$	Date of ac ≑	Status (	q) 💠 Status dat 🛊	Availa	abilit 💠	Acquisi	tio 🜲	Supplie	r (2)
				000015054	10.14-0.0005		13-May-2025			a - pur	chase	Založb	a M
H-BD-B14: Holdings for		2 - Arrangeme	IK\uC2\aVALV	000015954	13-May-2025								
H-BD-B14: Holdings for H-BD-C01: Label for ma		2 - Arrangeme 2 - Arrangeme	IK\uC2\aVAL\ IK\uP\aPRITC	000015954	13-May-2025 14-Feb-2025		14-Feb-2025			a - pur	chase	Založb	a M
H-BD-B14: Holdings for H-BD-C01: Label for ma H-BD-C02: Label for ma	1     2       2     2       3     2	2 - Arrangeme 2 - Arrangeme 2 - Arrangeme	IK\uC2\aVALV IK\uP\aPRITC IK\uP\aPRITC	000015954 000015928 000015929	13-May-2025 14-Feb-2025 14-Feb-2025		14-Feb-2025 14-Feb-2025			a - pur	chase chase	Založb Založb	a M a M
H-BD-B14: Holdings for H-BD-C01: Label for ma H-BD-C02: Label for ma H-BD-C03: Label for ma	1     2       2     2       3     2       4     2	2 - Arrangeme 2 - Arrangeme 2 - Arrangeme 2 - Arrangeme	IK\uC2\aVALV IK\uP\aPRITC IK\uP\aPRITC IK\uP\aPRITC	000015934 000015928 000015929 000015930	13-May-2025 14-Feb-2025 14-Feb-2025 14-Feb-2025		14-Feb-2025 14-Feb-2025 14-Feb-2025			a - pur a - pur a - pur	chase chase chase	Založb Založb Založb	oa M oa M oa M
H-BD-B14: Holdings for H-BD-C01: Label for ma H-BD-C02: Label for ma H-BD-C03: Label for ma H-BD-C04: Label for ma	1     2       2     2       3     2       4     2       5     2	2 - Arrangeme 2 - Arrangeme 2 - Arrangeme 2 - Arrangeme 2 - Arrangeme	IK\uC2\aVALV IK\uP\aPRITC IK\uP\aPRITC IK\uP\aPRITC IK\uC1\aDON	000015934 000015928 000015929 000015930 000015835	13-May-2025 14-Feb-2025 14-Feb-2025 14-Feb-2025 04-Dec-2024		14-Feb-2025 14-Feb-2025 14-Feb-2025 14-Feb-2025 04-Dec-2024			a - pur a - pur a - pur a - pur	chase chase chase chase	Založb Založb Založb STARŠ	a M a M a M
H-BD-B14: Holdings for H-BD-C01: Label for ma H-BD-C02: Label for ma H-BD-C03: Label for ma H-BD-C04: Label for ma H-BD-C05: Label for ma	$ \begin{array}{c ccccccccccccccccccccccccccccccccccc$	<ol> <li>Arrangeme</li> <li>Arrangeme</li> <li>Arrangeme</li> <li>Arrangeme</li> <li>Arrangeme</li> <li>Arrangeme</li> <li>Arrangeme</li> </ol>	IK\uC2\aVALV IK\uP\aPRITC IK\uP\aPRITC IK\uP\aPRITC IK\uC1\aDON. IK\uC1\aCUI (	000015954 000015928 000015929 000015930 000015835 000015894	13-May-2025           14-Feb-2025           14-Feb-2025           14-Feb-2025           04-Dec-2024           29-Jan-2025		14-Feb-2025 14-Feb-2025 14-Feb-2025 04-Dec-2024 29-Jan-2025			a - pur a - pur a - pur a - pur a - pur	chase chase chase chase chase	Založb Založb Založb STARŠ Založb	oa M oa M oa M il BA oa Ef

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

Reports: Busin	ness documents	×
Report definitions		
Q		
H-BD-B01: Holdi H-BD-B02: Holdi	Enter parameters for report creation	
H-BD-B04: List o H-BD-B05: Recei	Parameters	
H-BD-B06: List o H-BD-B07: List o	Comment in the title *	
H-BD-B08: Holdi H-BD-B09: List o	Purchase from Nov *24 to today	
H-BD-B13: Mate H-BD-B14: Holdi	Load/save parameters: + new configuration V 2 ×	
H-BD-C01: Label	OK Cancel	
H-BD-C03: Label f	for material - format 2	
H-BD-C04: Label 1	for material – format 3	
H-BD-C05: Label f	for material – format 4	
Delete stored rep	ports Browse stored reports Add to favourites Create scheduled report Create report 0	Close

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 Or	aline Bibliographic System & Services	COBISS
		21-May-2
	-	21 1109 2
H – LIST OF MATERIAL		
HOLDINGS WITH DATE OF ACCESSIO	NING	Report code: H-BD-
HOLDINGS WITH DATE OF ACCESSIO Purchase from Nov *24 to today	NING Comment in the Title	Report code: H-BD-I
HOLDINGS WITH DATE OF ACCESSIO Purchase from Nov *24 to today	NING Comment in the Title	Report code: H-BD-I
HOLDINGS WITH DATE OF ACCESSIO Purchase from Nov *24 to today	NING Comment in the Title	Report code: H-BD-I
HOLDINGS WITH DATE OF ACCESSIO Purchase from Nov *24 to today  Prices - total in domestic currency:	EUR 1,171.40	Report code: H-BD-I
HOLDINGS WITH DATE OF ACCESSIO Purchase from Nov *24 to today Prices - total in domestic currency: Number of titles:	EUR 1,171.40	Report code: H-BD-
HOLDINGS WITH DATE OF ACCESSIO Purchase from Nov *24 to today  Prices - total in domestic currency: Number of titles: Total number of units:	EUR 1,171.40 61 64	Report code: H-BD-l

# 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 <u>4.13</u>. 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 <u>2.8</u>. Spreminjamo samo poizvedbo, ki jo določimo v iskalniku **Polje 996/997**.

Podatek o vrednosti teh enot najhitreje pridobimo z izpisom <u>*Z-PL-B08: Rekapitulacija podatkov</u> <u>o zalogi</u>. Postopek je opisan v točki <u>4.13</u>.</u>*</u>

## 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 <u>*Z-PL-B08: Rekapitulacija podatkov</u>* <u>*o zalogi*</u>. Postopek je opisan v točki <u>4.13</u>.</u>