
Next Search Catalog Staff Training Documentation

NEKLS Staff

Jul 02, 2019

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**CHAPTER
ONE**

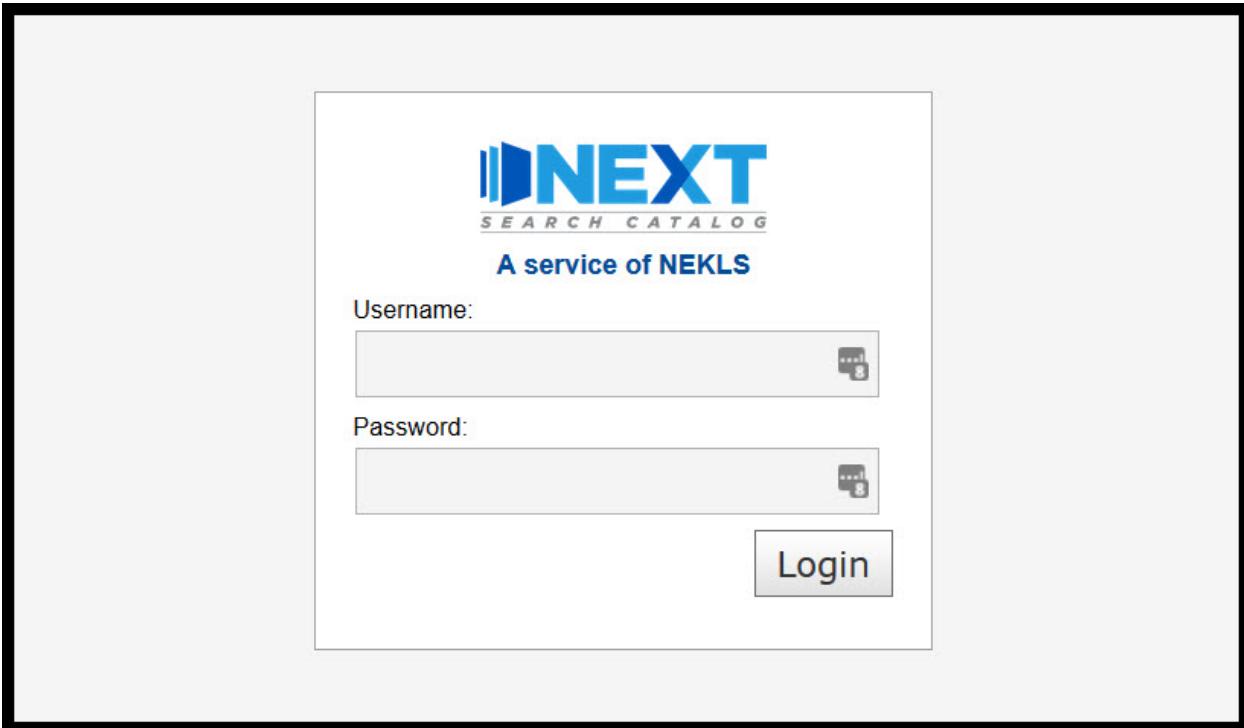
BASIC STAFF TRAINING

1.1 Next Search Catalog history

- The early years:
- NExpress began as a courier system among Northeast Kansas libraries, and several Northeast Kansas Library System members participated with the Kansas City Public Library Consortia (KCLC) through 2008.
- 2007:
- In 2007, NEKLS began to explore alternative options to KCLC, and NEKLS decided in 2008 to manage its own shared catalog called “NExpress.” The Koha integrated library management system was chosen and NEKLS contracted with LibLime - a division of Progressive Technology Federal Systems, Inc. (PTFS) - for support and server management.
- 2008:
- The NExpress shared catalog went live using Koha on August 15, 2008, with 13 participating libraries.
- 2009:
- 11 more libraries joined NExpress.
- 2011:
- In 2011, NExpress changed support companies from LibLime to ByWater Solutions.
- 2016
- Paola Free Public Library joined NExpress.
- 2018:
- In August of 2018 the catalog was re-branded from NExpress to “Next Search Catalog” with the help of Zephyr Marketing in Kansas City.
- 2019:
 - Highland Community College joined Next Search Catalog.
 - As of January 2019, Next Search Catalog includes 44 public libraries; 1 school district; and 1 community college library.

1.2 How to log in

Go to the staff client home page and enter your username and password



Note:

If you see a “You must reset your password” message, please see the instructions at (“*Staff account locked due to unsuccessful login attempts*”) to learn how to unlock the account.

1.3 Next staff client home page

If you log in successfully, you should see the staff client's home page - which should look something like this:

The screenshot shows the staff client interface for the Northeast Kansas Library System. At the top, there is a navigation bar with links for Circulation, Patrons, Search, Cart, OPAC, Helpful Links, Databases, and More. The user is logged in as TESTINGADMIN | Northeast Kansas Library System. The main content area includes a news feed with a highlighted item about an April Users Group Meeting, a navigation menu with links for Circulation, Patrons, Advanced search, Lists, Course reserves, Authorities, Cataloging, Serials, Acquisitions, Reports, Tools, Koha administration, and About Koha, and a system status section showing pending approvals and patron modifications.

News

April Users Group Meeting

The next Next Users Group Meeting will be on:
Tuesday, April 2, 10:00 a.m. - 12:00 p.m.
- Morrill Public Library (Hiawatha) (Map)
- Click here to attend via Zoom

The tentative agenda is available by clicking here.
If you have any agenda items you'd like to have added to the agenda, please email nexthelp@nekls.org.

If you plan to attend in person, please register by clicking here.

Posted on 03/19/2019 [Edit](#) | [Delete](#) | [New](#)

Important links for Northeast Kansas Library System

Holds report
- Opens in a new window
- (no patron information)

Shareit statewide ILL
- Opens in a new window

Posted on 09/25/2016 [Edit](#) | [Delete](#) | [New](#)

Important contact information

Next support:
nexthelp@nekls.org

Español English

Circulation

Patrons

Advanced search

Lists

Course reserves

Authorities

Cataloging

Serials

Acquisitions

Reports

Tools

Koha administration

About Koha

Suggestions pending approval: 306
Patrons requesting modifications: 6

Next: staff client

[Statistics - 2019](#) [Locked accounts](#) [Statistics - 2018](#)

Next Search Catalog Staff Training Documentation

Things to note:

1. In upper right hand corner of every page you'll see the username you've used to log in and the library that you are logged in at
2. Which modules you see will depend on your security level - the TESTINGADMIN account we've used to log in to create these screenshots has the highest security level possible
3. Important links and information will appear on the left hand side of the home page
4. Statistics and other important information will appear in the area at the bottom of this page

The screenshot shows the homepage of the Next Search Catalog. At the top, there is a navigation bar with links for Circulation, Patrons, Search, Cart, OPAC, Helpful Links, Databases, and More. On the far right, it displays 'TESTINGADMIN | Northeast Kansas Library System' and a Help link. A search bar at the top center contains the placeholder 'Enter patron card number or partial name:' and a 'Submit' button. Below the search bar are links for Check out, Check in, Renew, Search patrons, and Search the catalog.

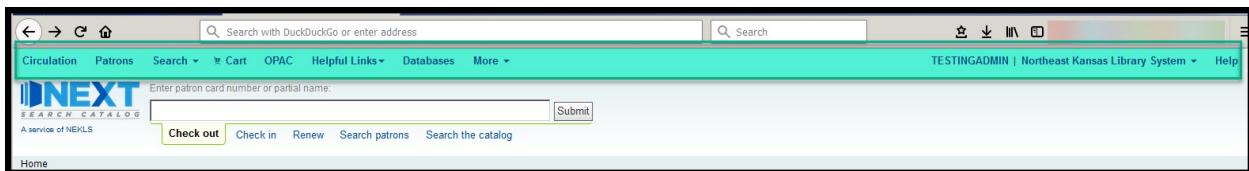
The main content area is divided into several sections:

- News:** A box titled 'April Users Group Meeting' with a red border. It contains text about the meeting, a map, and a link to attend via Zoom. A circled '3' is placed over this box.
- Circulation:** A section containing links for Patrons, Advanced search, Lists, Course reserves, and Authorities. A circled '2' is placed over this section.
- Cataloging:** A section containing links for Serials, Acquisitions, Reports, Tools, Koha administration, and About Koha.
- Important links for Northeast Kansas Library System:** A list including Holds report, Shareit statewide ILL, and a link to the library's website.
- Important contact information:** A box containing the email address 'nexthelp@nekls.org'. A circled '4' is placed over this box.
- Suggestions pending approval:** Shows 306 suggestions.
- Patrons requesting modifications:** Shows 6 patrons.
- Next: staff client:** A section showing Statistics - 2019, Locked accounts, and Statistics - 2018.

1.4 Useful things to know

1.4.1 Page header

The same header appears on every page in the staff client and allows you to easily find your way to any module you have access to on the left hand side of the page. You can always see your username and logged in library on the right hand side of the page.



1.4.2 Next logo

The Next Search Catalog logo appears on most pages in the staff client. Clicking on the logo takes you back to the staff client home page.



1.4.3 Flexible search box

A flexible input box appears on most pages just to the right of the logo:



On the home page, you can switch from Check out to Check in to Renew to Search Patron to Search the catalog all by clicking on the text under the input box.

The flexible input box appears on *almost* every page in the staff client and allows you to quickly switch functions. The functions that are available vary from page to page in the staff client.

1.4.4 Breadcrumbs

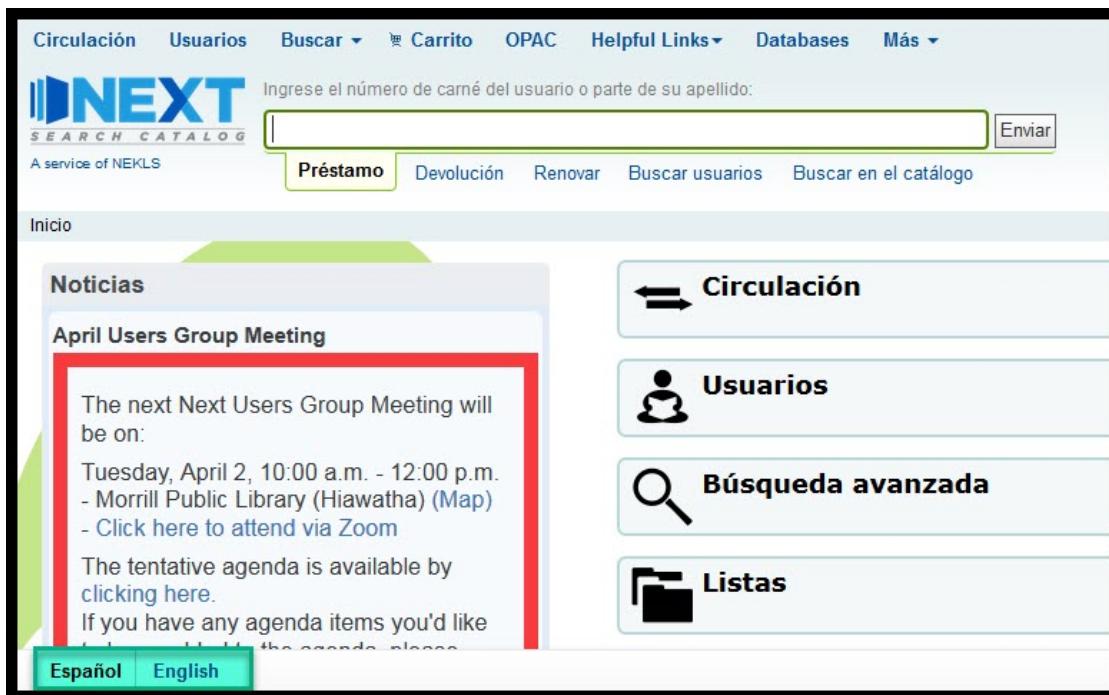
Breadcrumbs appear on every page in the staff client. This allows you to easily see which module and what function of that module you are using.



Each level to the left of a ‘>’ symbol is one level up in the system’s hierarchy.

1.4.5 Language controls

The bottom left hand corner of each page in the staff client includes controls to switch the catalog’s built-in language from English to Spanish.



These controls only affect the language of the built-in controls in the system. It will not change the language of any data we’ve added to the system such as patron names or bibliographic record information.

1.5 Checking items in

1.5.1 Check-in is your friend

Check-in is your friend

If you find an item and you're not sure what to do with it, check in the item and the system will tell you what to do with the item.

Check in is your friend

If an item has been marked as “Lost” or “Missing,” checking in the item will remove these statuses.

Check in is your friend

If an item needs to be shipped to another library, checking in the item will trigger the transfer process. If an item is “In transit” back to your library, checking the item in will take the item out of transit and make it appear as “Available” in the catalog again.

Check in is your friend

Checking an item in updates an item’s “Last seen” date, so checking an item in can help staff locate items by letting staff know when and where an item was last checked in. The check-in process does not damage an item or the integrity of an item’s bibliographic record.

Check in is your friend

So, if you’re not sure what to do with an item, check it in and let the system tell you if the item needs any special handling or if it should just be reshelfed.

1.5.2 How to check-in

1. Go to the check-in page (see “*Three ways to access check-in*” to learn how to get there)
2. Scan an item barcode in the check-in input box

Enter patron card number or partial name: Submit

Check out Renew Search the catalog

Home > Circulation > Check in

Circulation home

Circulation

- > Check out
- > Check in
- > Renew

Circulation reports

- > Holds queue
- > Holds awaiting pickup
- > Hold ratios
- > Transfers to receive
- > Overdues
- > Overdues with fines

Check in

Enter item barcode: Submit

Options

Forgive overdue charges
 Book drop mode

Enter the barcode number of the item you wish to check-in here

1.5.3 Normal check-in results

- If the item being checked in was checked out to a patron at the time it was checked in, the *Patron* column on the check-in table will display the patron's name. This column will also indicate how many items that patron still has checked out.

The screenshot shows the 'Check in' interface. The 'Check in' section contains a barcode input field and a 'Submit' button. The 'Options' section includes checkboxes for 'Forgive overdue charges' and 'Book drop mode'. The 'Checked-in items' table displays the following data:

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
04/17/2019 23:59	Mile 22		0003008201805	Northeast Kansas Library System	Northeast Kansas Library System	Adult		MOVIES DVD	Frosty, Marlene Tova (Adult)	Checkouts: 3

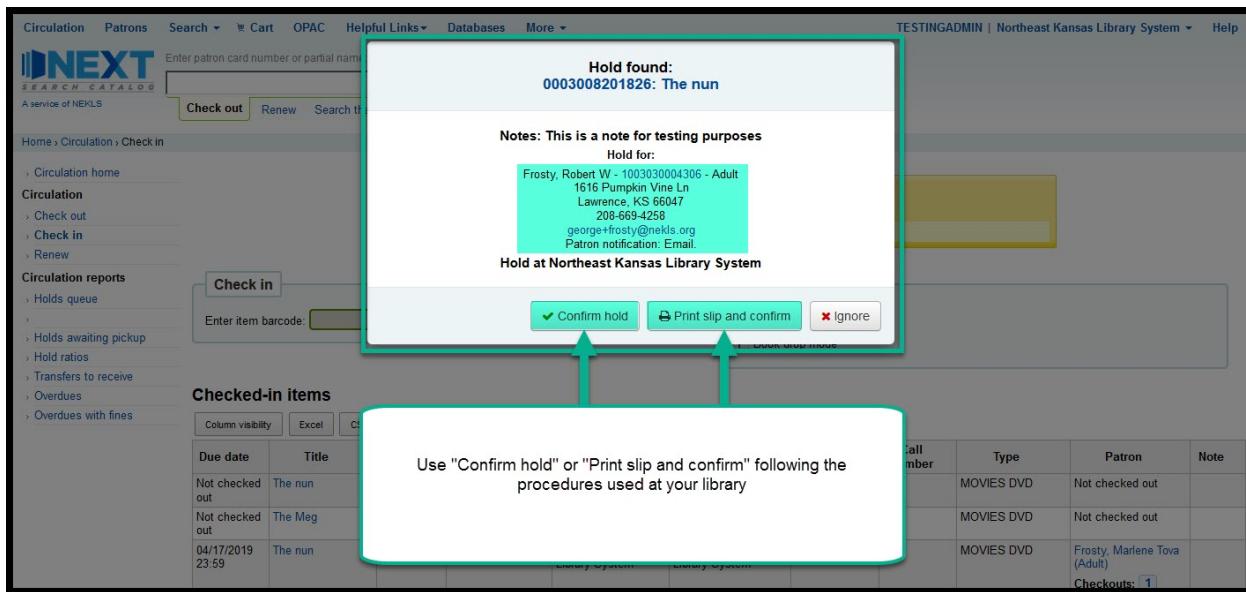
- If the item being checked in was not checked out to a patron at the time it was checked in, you will see a yellow pop-up message on the screen that says "Not checked out" and the *Patron* column on the check-in table will say "Not checked out"

The screenshot shows the 'Check in' interface. A yellow 'Check in message' box displays the text 'Not checked out.'. The 'Check in' table displays the following data:

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
Not checked out	Managing projects with Make /	Oram, Andrew.	0003008001921	Northeast Kansas Library System	Northeast Kansas Library System	Adult	PROG 005.4 ORA	BOOK Professional Collection	Not checked out	
04/17/2019 23:59	The Meg		0003008201806	Northeast Kansas Library System	Northeast Kansas Library System	Adult		MOVIES DVD	Frosty, Marlene Tova (Adult)	Checkouts: 2

1.5.4 Checking in an item on hold

If you check in an item that has arrived at your library to fill a patron's request, checking in the item will generate a pop-up message indicating that the item needs to be held for that patron, and the patron's contact information.

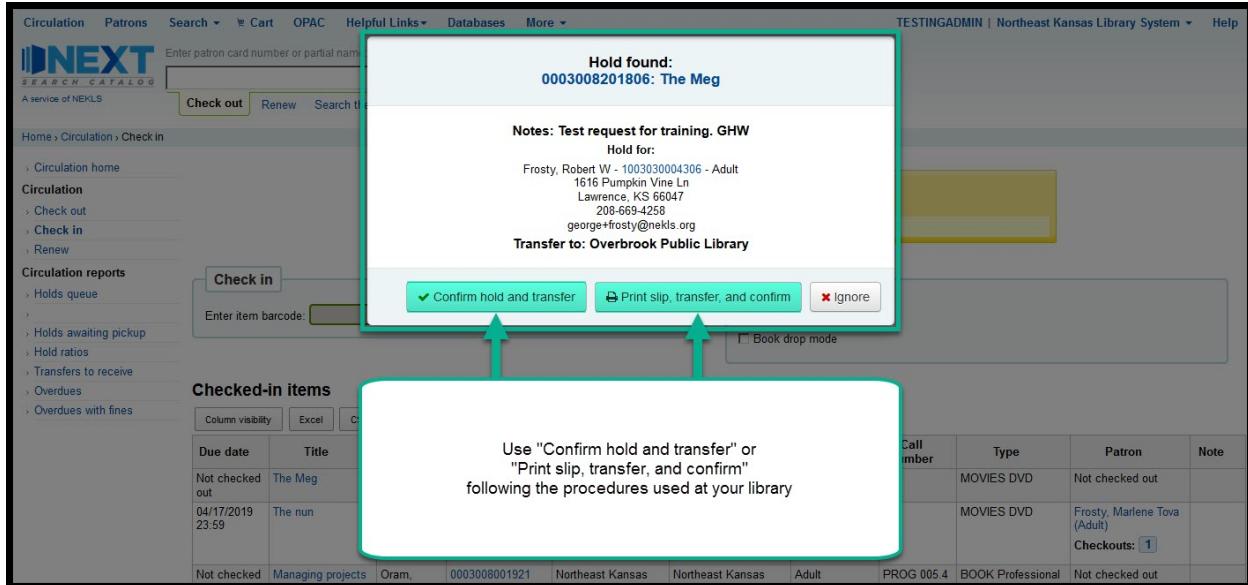


- When this happens you need to follow the procedures at your library for filling holds which may include printing a hold slip receipt for the item.

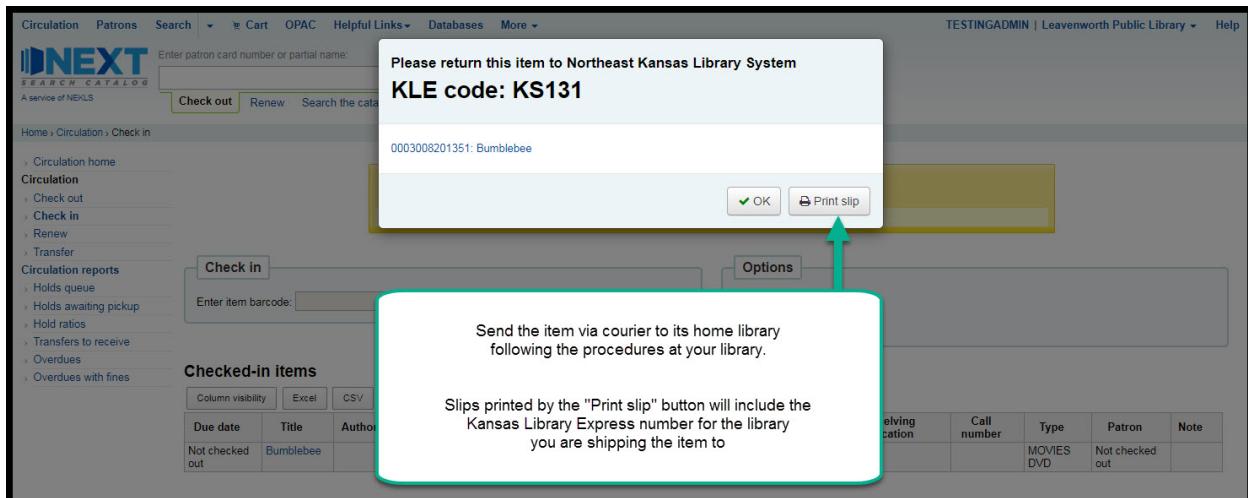
1.5.5 Checking in an item to be shipped

After you enter the barcode number, if the item needs to be shipped to another library, a transfer window will pop up. There are two types of transfer:

1. Transferring an item with a request for pickup at a different library



2. Transferring an item that is owned by another library back to its home



In either case you need to follow the procedures at your library for shipping items between libraries. If your library prints receipts, the courier code for the receiving library should match the courier code on the KLE label you use for shipping the item.

1.5.6 Checking in an item that had been declared lost or missing

If a pop-up window appears indicating that the item was lost but has now been found, this indicates that the item had a status of “LIST LOST STATUSES” at the time it was checked in. Checking the item in will remove any of these statuses from the item record and it should remove any fees to any patron that may have been billed for as lost item replacement fees.

The screenshot shows the Next Search Catalog interface. In the center, a yellow box displays a "Check in message" for item number 0003008201806: The Meg. The message states: "Item was lost, now found." Below this, it says "A refund has been applied to the borrowing patron's account." and "Not checked out." To the left of the message box is a "Check in" button and a form for entering an item barcode. To the right is an "Options" section with checkboxes for "Forgive overdue charges" and "Book drop mode". At the bottom, there is a table titled "Checked-in items" showing one row of data for the checked-in item.

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
Not checked out	The Meg		0003008201806	Northeast Kansas Library System	Northeast Kansas Library System	Adult		MOVIES DVD	Not checked out	

1.5.7 Checking in an item with a message

If an item appears with a check-in message, you should follow your library’s process for handling patron notes. If the item is owned by another library, it’s a very good idea to print out the note, put the note in the item, so the owning library can review the note when they receive the item.

The screenshot shows the Next Search Catalog interface. A central yellow box displays a "Patron note" for item number 0003008201821. The note reads: "The patron says: This DVD is scratched and wouldn't play right". Below the note are two buttons: "Print this note" and "Email this note to the home library". A callout bubble points to these buttons with the text: "If a 'Patron note' appears when you check an item in, you should follow your library's procedure for notifying the owning library about the problem." To the left of the note box is a "Check in" button and a form for entering an item barcode. To the right is an "Options" section. At the bottom, there is a table titled "Checked-in items" showing one row of data for the checked-in item.

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
Not checked out	The Meg		0003008201806	Northeast Kansas Library System	Northeast Kansas Library System	Adult		MOVIES DVD	Not checked out	

1.5.8 Checking in an item that cannot be found

If you check in an item and get an “Item not found” message, it is possible the barcode scanner miss-read the barcode number or it’s possible that item record has been deleted from the system.

The screenshot shows the staff interface of the Next Search Catalog. At the top, there's a navigation bar with links for Circulation, Patrons, Search, Cart, OPAC, Helpful Links, Databases, and More. On the right, it shows 'TESTINGADMIN | Northeast Kansas Library System' and a 'Help' link. The main area has a search bar with placeholder text 'Enter patron card number or partial name:' and a 'Submit' button. Below the search bar are buttons for 'Check out', 'Renew', and 'Search the catalog'. A breadcrumb trail indicates the user is at 'Home > Circulation > Check in'. To the left, a sidebar menu includes 'Circulation home', 'Circulation' (with sub-links for Check out, Check in, Renew), 'Circulation reports' (with sub-links for Holds queue, Holds awaiting pickup, Hold ratios, Transfers to receive, Overdues, Overdues with fines), and 'Checked-in items' (with sub-links for Column visibility, Excel, CSV, Copy, Print). In the center, a yellow box displays a 'Check in message' with the text 'No item with barcode: 00106000338066'. Below this is a 'Check in' form with a text input field for 'Enter item barcode:' and a 'Submit' button. To the right is an 'Options' section with checkboxes for 'Forgive overdue charges' and 'Book drop mode'. At the bottom, a table titled 'Checked-in items' lists one item:

Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
04/17/2019 23:59	Mission: Impossible - Fallout		0003008201821	Northeast Kansas Library System	Northeast Kansas Library System	Adult		MOVIES DVD	Frosty, Marlene Tova (Adult)	

If the item was deleted within the previous 13 months, you can find out basic information about the item by running report 3113. If you wish to find any fines/fees history you can run report 3009.

1.6 Checking items out

Access the patron's account

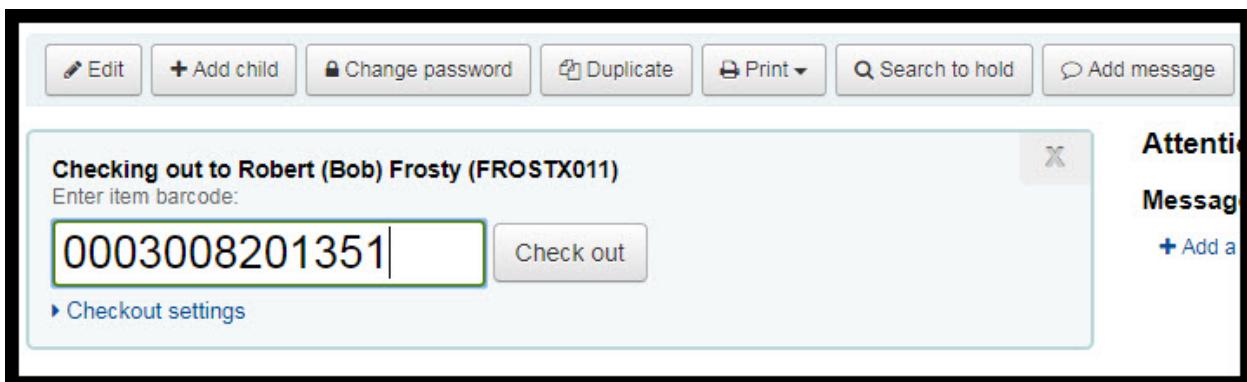
The screenshot shows the Okoha library catalog interface. At the top, there is a navigation bar with links for Circulation, Patrons, Search, Cart, OPAC, Helpful Links, Databases, and More. Below the navigation bar, it says "NExpress Super Librarian!" and features the Okoha logo. A search bar is present with the placeholder "Enter patron card number or partial name:" and a "Submit" button. Below the search bar are buttons for Check out, Check in, Search patrons, and Search the catalog. A "Home" link is also visible.

Make sure you've got the correct account

The screenshot shows the patron details page for Robert (Bob) Frosty (FROSTX011). On the left, there is a sidebar with links for Check out, Batch check out, Details, Fines and fees, Routing lists, Circulation history, Holds history, Modification log, and Notices. The main content area shows the patron's information: Category: Adult (AD), Home library: Northeast Kansas Library System, Borrower number: 265150, and an update date of 06/11/2019 09:05. A large green box highlights the "Check out" link in the sidebar. In the center, a modal window titled "Checking out to Robert (Bob) Frosty (FROSTX011)" is open, showing a barcode input field and a "Check out" button. A green box highlights this modal. Below the modal, there are buttons for "0 Checkouts", "0 Holds", and "Restrictions". A message states "Patron has nothing checked out." To the right, there is an "Attention:" section with a "Messages" link and a "+ Add a new message" button. A large green box encloses the entire central area, with the text "Check here -- or here" pointing to the "Check out" link in the sidebar and the "Check out" button in the modal, followed by the instruction "to make sure you have the correct patron."

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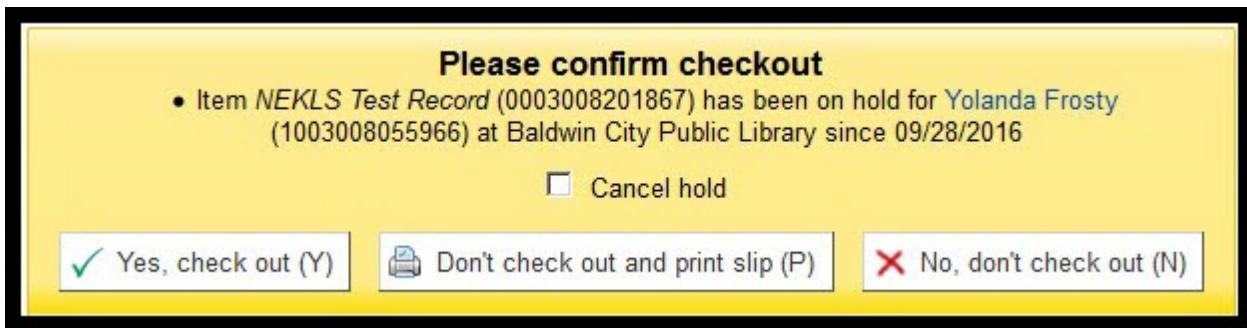
Scan the item barcode in the “Enter item barcode” field



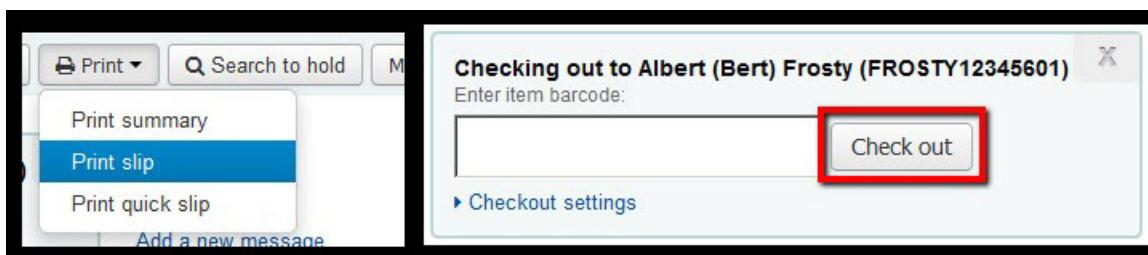
The “Checkouts table will update with information about the item you just checked out”

The screenshot shows the "Checkouts" table after a check-in. A green banner at the top states "Checked out: Bumblebee (0003008201351). Due on 07/23/2019". Below this, the table has a header row with columns for "Due date", "Title", "Item type", "Location", "Home library", "Checked out on", "Checked out from", and "Call no.". Under "Today's checkouts", there is one entry: "07/23/2019 Bumblebee [videorecording (DVD)] / Travis Knight, director. 0003008201351 MOVIES Adult Northeast Kansas Library System 07/02/2019 12:02 Northeast Kansas Library System". The table includes buttons for "Column visibility", "Excel", "CSV", "Copy", and "Print".

Follow your library’s procedures for errors if any error messages pop up

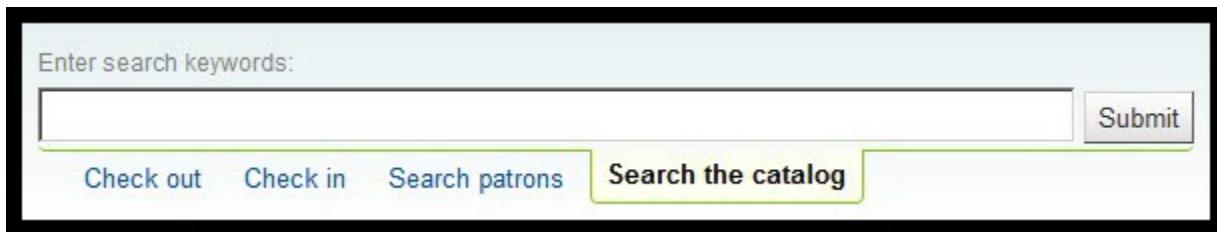


Print a receipt if needed once all items have been checked out



1.7 Searching the catalog

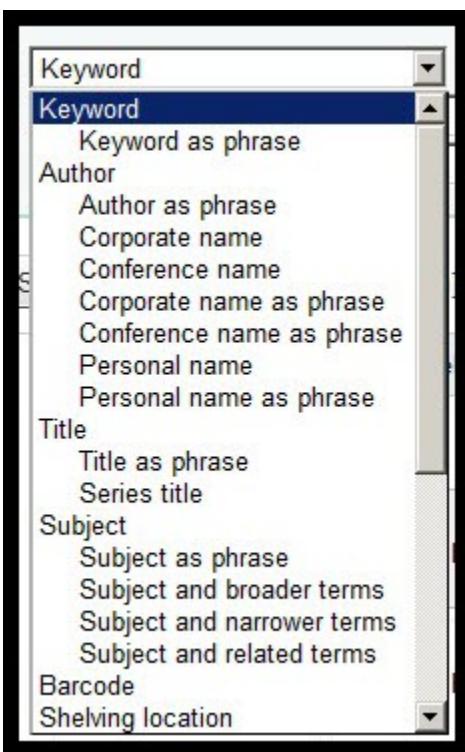
The “Search the catalog” field in the flexible search box is a simple keyword search.



The advanced search page offers you more flexibility for searching.

A screenshot of the Advanced search page. At the top, there is a navigation bar with links for "Circulation", "Patrons", "Search", "Cart", "OPAC", "Helpful Links", "Databases", and "More". A green arrow points from the text "From any page, hover over \"Search\" on the header and then click \"Advanced search\" from the drop-down" to the "Search" link in the navigation bar. Below the navigation bar, the page title is "Advanced search" and the subtitle is "Go to item search". There is a search bar with fields for "Search for" (Keyword, and, Keyword) and "Collection", "Item type", and "Shelving location". At the bottom, there is a section titled "Limit to any of the following:" with various category icons and labels: (Unclassified), Atlas, Bakeware, Bilingual, Binder, Biography, Blu-Ray, Blu/Ray - DVD, Board Book, and Book on. At the very bottom of the page are language selection buttons for "Español" and "English".

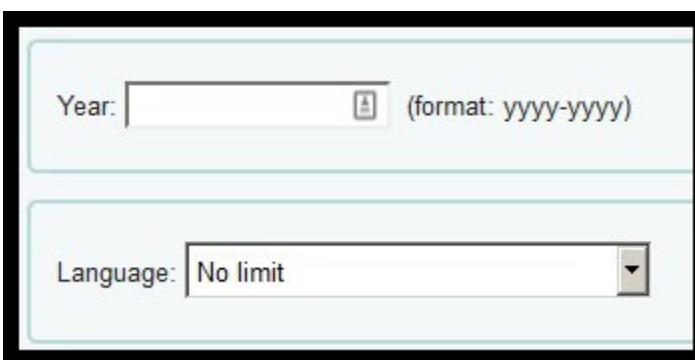
The “Advanced search” page allows multiple search types



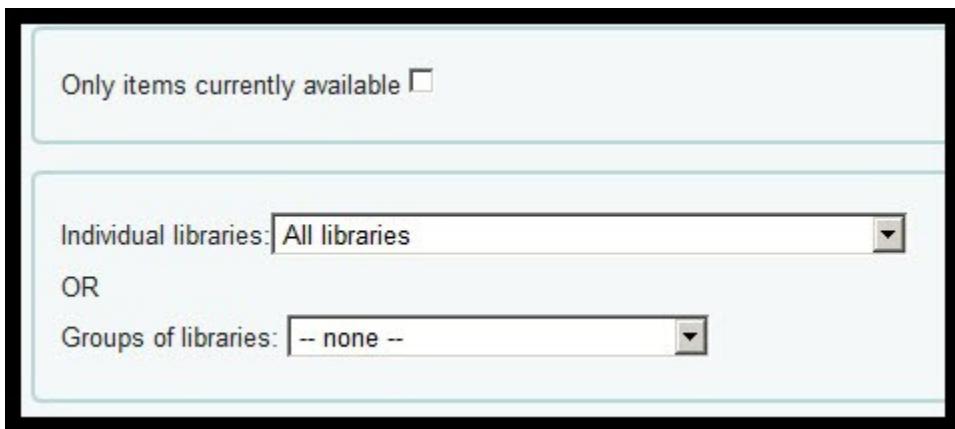
An advanced search can be limited by Collection code, Item type, and Shelving location



An advanced search can also be limited by year and language (provided that the language information is included in the bibliographic record)



Searches can also be limited by library and availability



CHAPTER
TWO

NOTES/APPENDIX FOR BASIC STAFF TRAINING

2.1 Three ways to access check-in

2.1.1 A. Access check-in from the flexible input box

From most pages you can set the flexible input box to Check in and then start entering barcode numbers in the input box.



2.1.2 B. Access check-in from the home page

From the home page you can click on the “Circulation” button and then click on the “Check in” button on the circulation page.

The image consists of three vertically stacked screenshots of the Next Search Catalog website, illustrating the process of accessing the check-in function from the home page.

Screenshot 1: The top screenshot shows the main home page. A red box highlights the "April Users Group Meeting" news item, which contains text about the meeting date and location. To the right, under the "Circulation" heading, there is a "Check in" button highlighted with a green circle and the number "1".

Screenshot 2: The middle screenshot shows the "Circulation" page after clicking the "Check in" button. The "Check in" button is now highlighted with a green circle and the number "2". Other buttons like "Check out", "Renew", and "Set library" are also visible.

Screenshot 3: The bottom screenshot shows the "Check in" page. It features a search bar at the top, followed by a "Check in" button highlighted with a green circle and the number "3". Below the button is a text input field labeled "Enter item barcode:" with the placeholder "Enter Barcode here!" and a "Submit" button. To the right, there is an "Options" section with checkboxes for "Forgive overdue charges" and "Book drop mode".

2.1.3 C. Access check in from any page

From any page you can click on the “Circulation” link in the page header and then click on the “Check in” button on the circulation page.

The figure consists of three vertically stacked screenshots of the Next Search Catalog interface, each with a numbered callout circle (1, 2, or 3) highlighting a specific element.

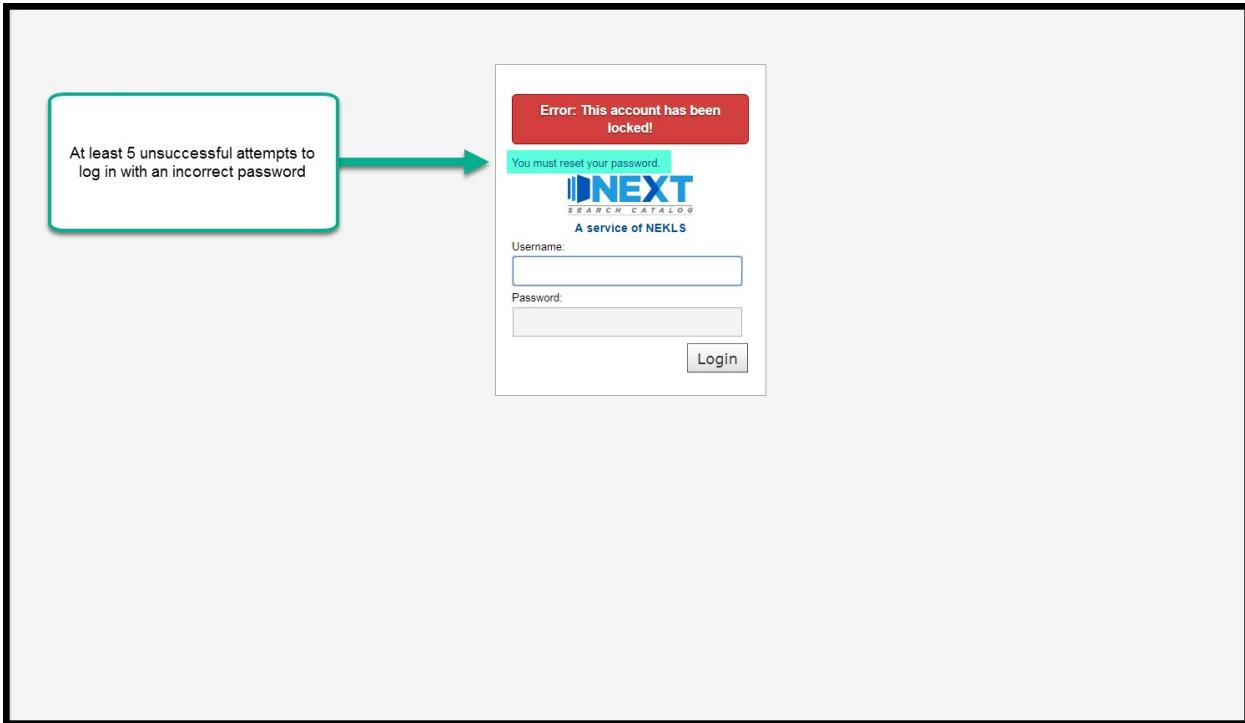
Screenshot 1: Shows the main catalog search page. A green circle labeled '1' is over the 'Circulation' link in the top navigation bar. Below it, the search results for 'kw,wrld: day of the jackal' are displayed, with the first result being 'The day of the jackal [videorecording (DVD)]'.

Screenshot 2: Shows the Circulation page under the 'Circulation' section of the top navigation. A green circle labeled '2' is over the 'Check in' button in the 'Circulation' column.

Screenshot 3: Shows the 'Check in' page. A green circle labeled '3' is over the 'Check in' button in the center of the page, which has a sub-label 'Enter item barcode: Enter Barcode here'.

2.2 Staff account locked due to unsuccessful login attempts

If you attempt to log into the staff client more than five (5) times with an incorrect password, the account you're using will be locked. This is a security measure to prevent unauthorized persons from accessing the confidential information on our system.



If this happens, you have two (2) options for unlocking the account:

2.2.1 Unlock by calling NEKLS

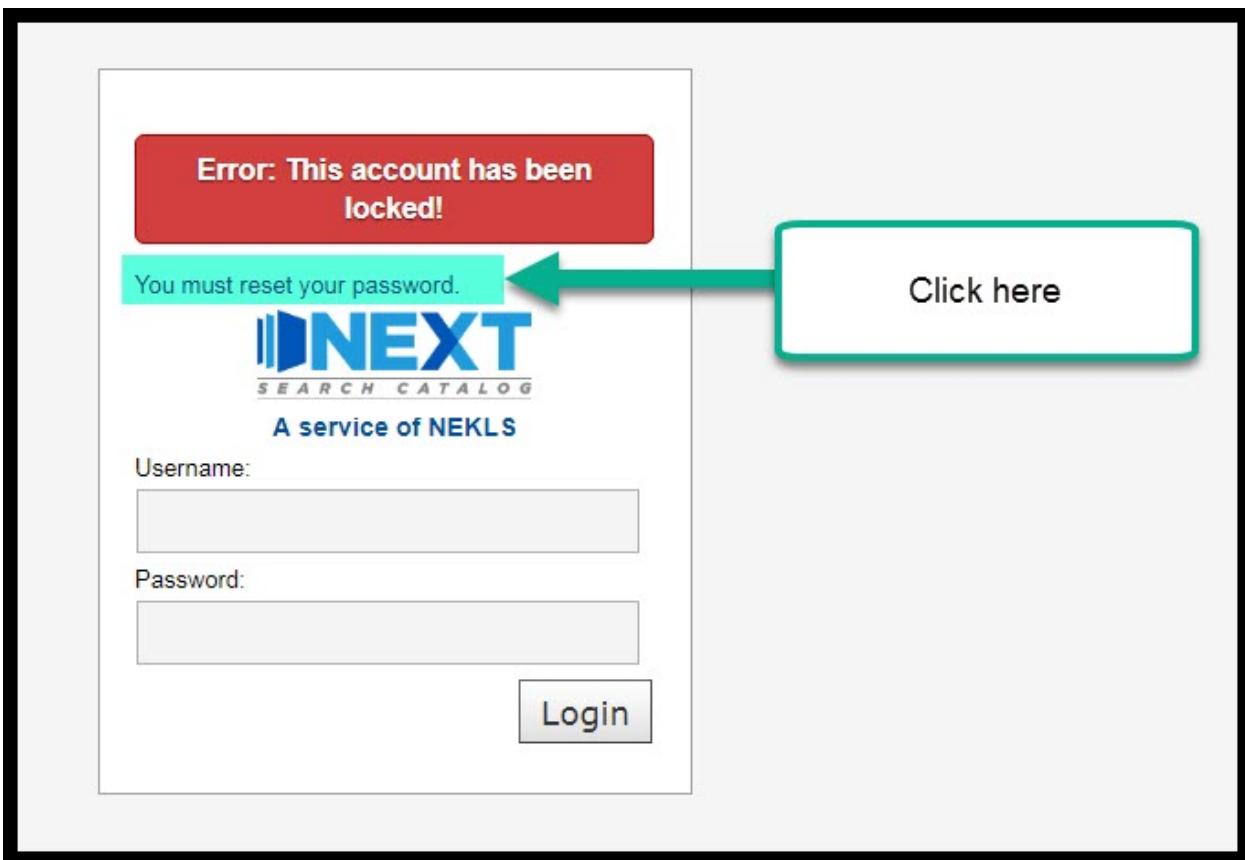
Because staff login accounts have a “SYSTEM LOGIN ONLY” account category, only system administrators can change the passwords on these accounts through the staff client. Since the only system administrators are at the NEKLS office, if you lock yourself out, NEKLS staff should be able to give you a new password to unlock the account.

2.2.2 Unlock through the OPAC

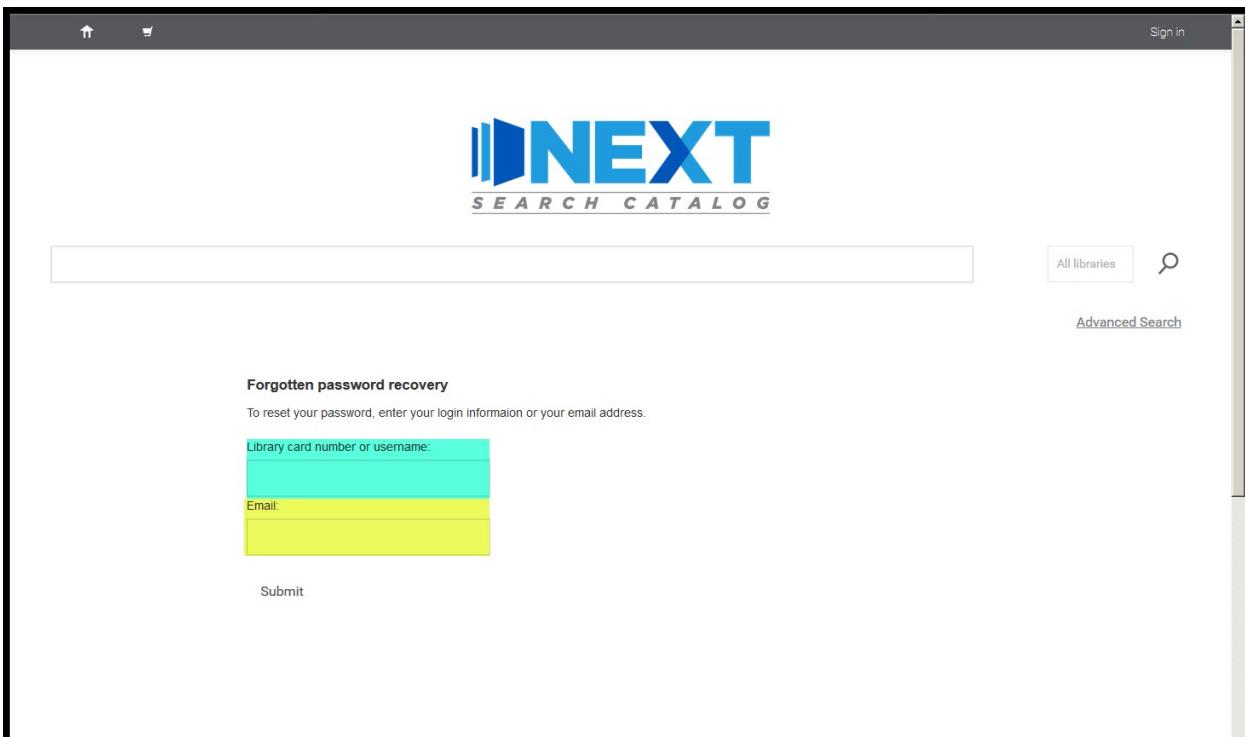
If you lock a staff account *and* there is an e-mail address on the account, you can unlock the account yourself by clicking on the “You must reset your password” text on the login page.

Note: most staff accounts such as LIBRARYCIRC; LIBRARYTECH; and LIBRARYDIRECTOR have the default e-mail address for that library on the account as their e-mail address. If you do not normally have access to this account or are unsure which email account goes with your account, this method will not really work for you.

1. On the staff client login page, click on the “You must reset your password” link.

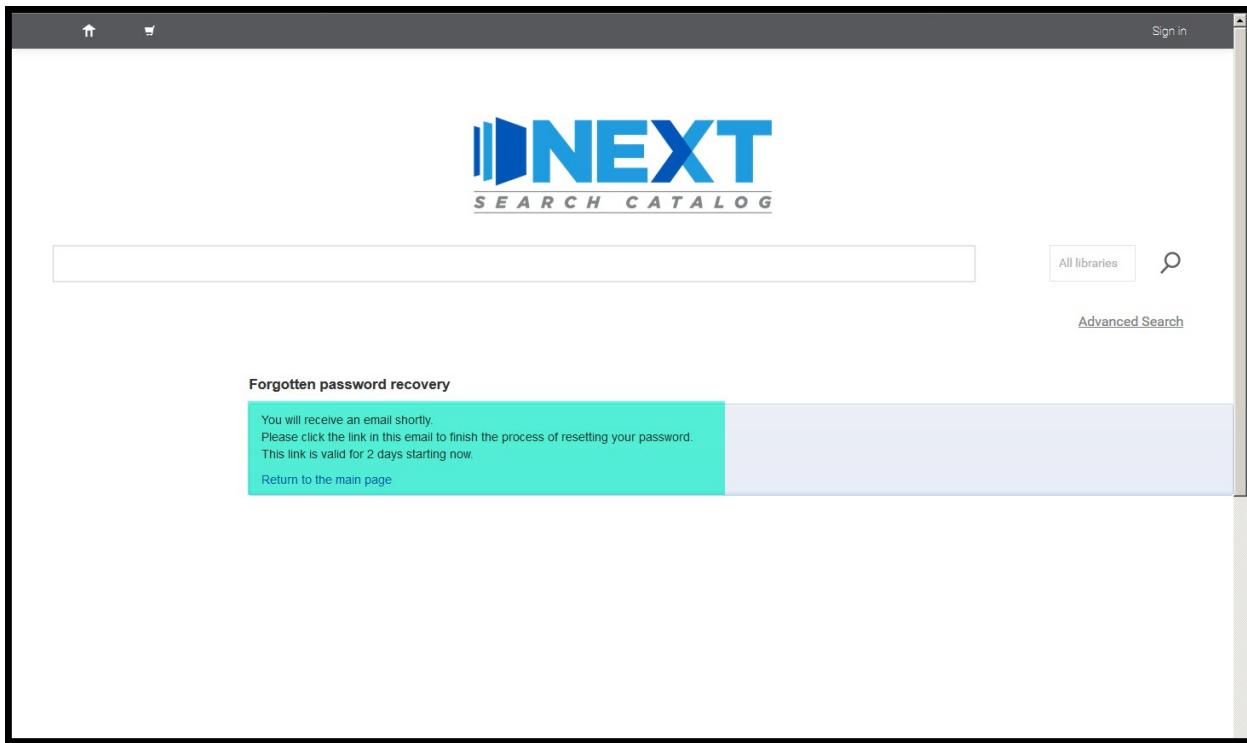


2. On the “Forgot your password?” page, you need to fill out the form with A) your staff username; and B) the e-mail address that goes with this account.

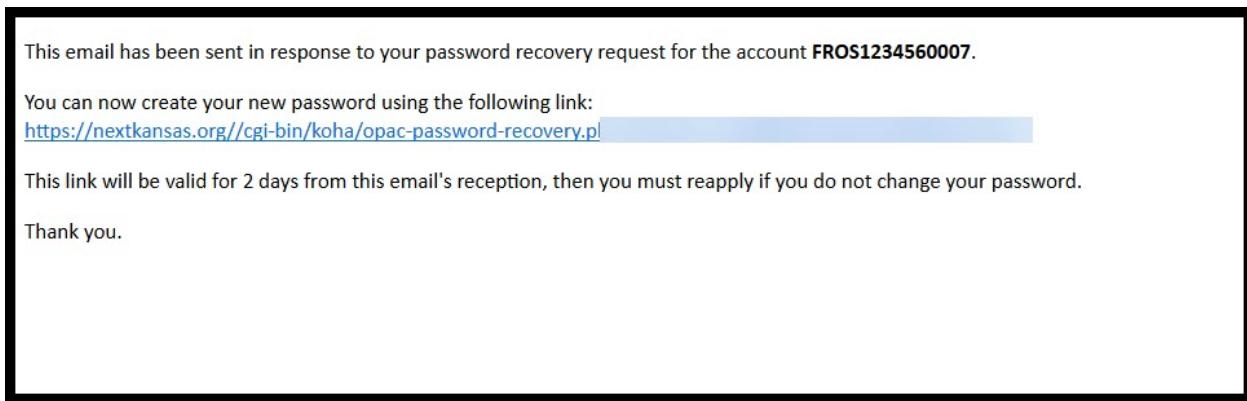


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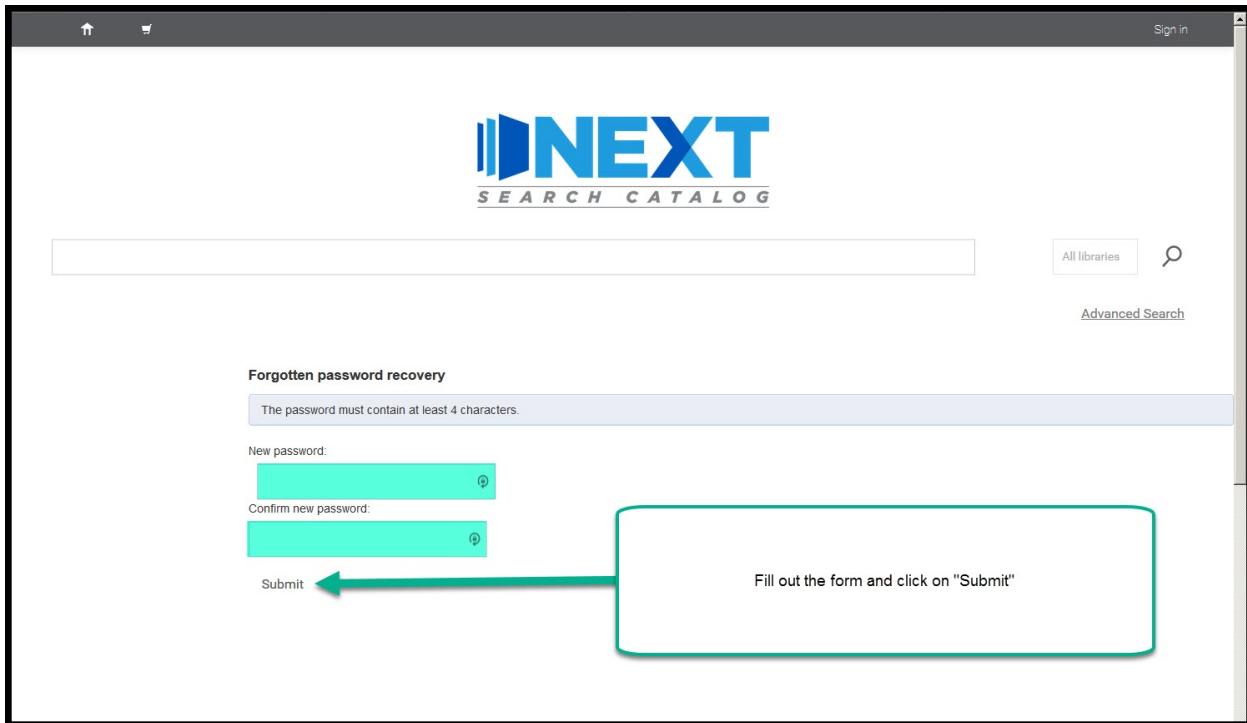
3. If the login information and the e-mail address match this message should appear:



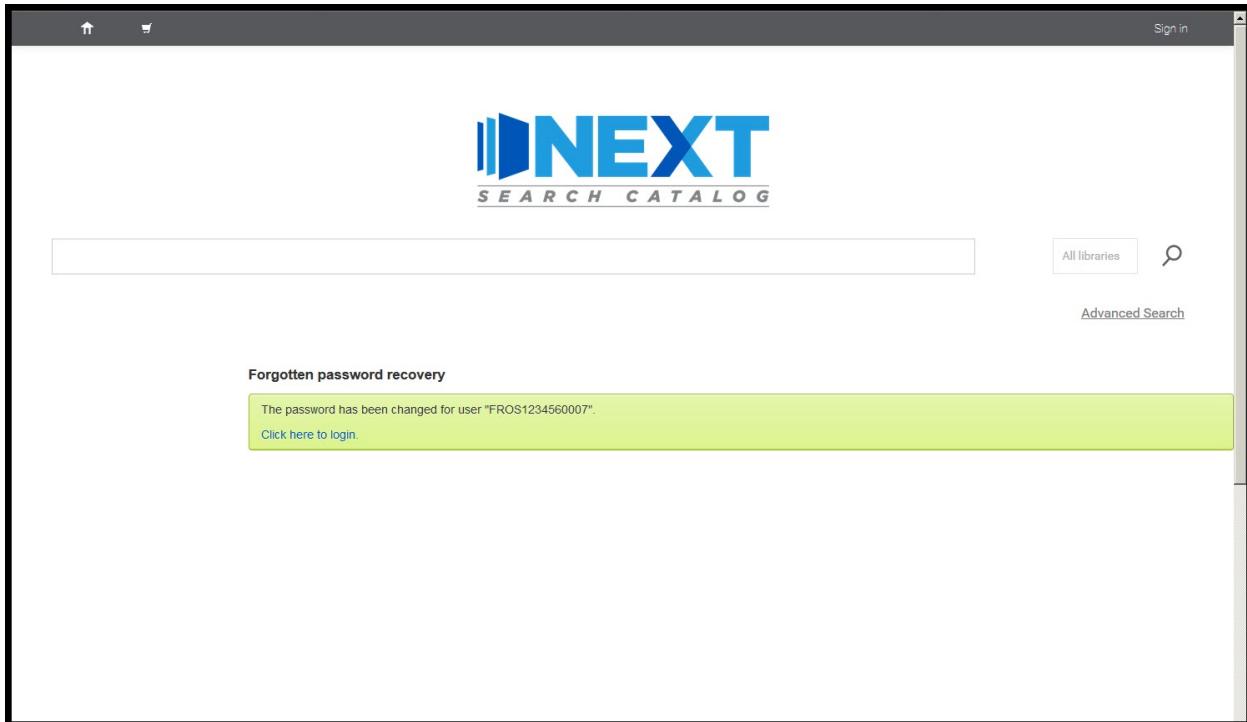
4. If successful, you should receive an e-mail address like this one within 15 minutes:



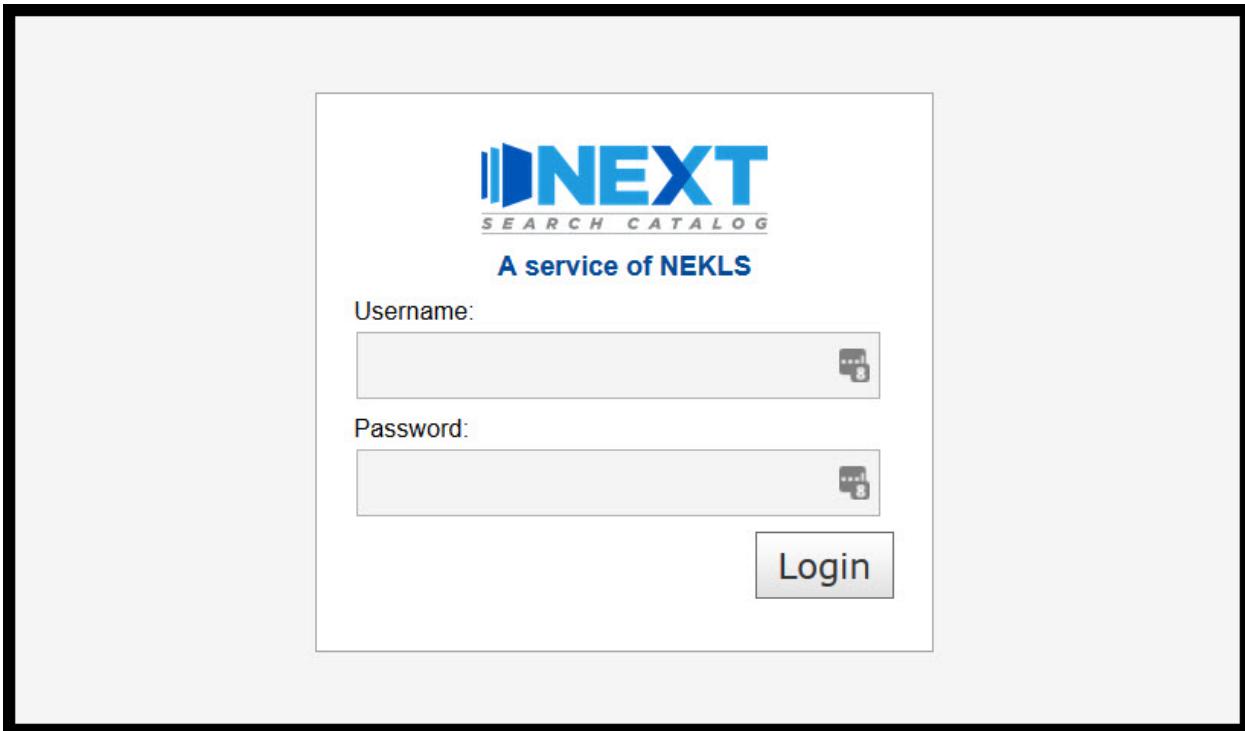
5. When you open the link included in the e-mail, you should be taken to a page that will allow you to create a new password:



6. A final message should indicate if the password has been successfully changed.



7. Go back to the login page and try to log in again with the new password.



2.3 Timeline for deleted items

1. Patron checks out an item and a due date is assigned to the item (the due date may be updated if the patron renews the item)
2. X days after an item's due date, the patron is sent a first overdue notice
 - the number of days varies by library
3. 35 days after an item's due date, the patron is sent a second overdue notice saying that the item will be declared "Lost" in 10 more days
4. 45 days after an item's due date, the patron is sent a third overdue notice saying that they are being billed for the replacement cost of the item
5. 46 days after an item's due date at between 12:01 a.m. and 2:00 a.m., the item's status is changed from "checked out" to "Lost (more than 45 days overdue)"
 - when the status is changed to "Lost (more than 45 days overdue)" the item is removed from the list of items checked out to the patron and the patron is billed for the replacement cost of the item as recorded in the item record (Marc field 952\$v)
6. 13 months after the item has been declared "Lost (more than 45 days overdue) the system will automatically delete the item record
 - At this time, a copy of the item's record is moved from the "items" table in the database to the "deleteditems" table
 - ** some libraries have policies and processes in place to manually delete these items before the 13 month automatic deletion has been triggered
7. 13 months after the item data has been moved from "items" to "deleteditems" the system will automatically delete the data from the "deleteditems" table - this is done to reduce the size of the database

2.3.1 Frequently asked questions about deleted items

Q: “A patron returned an item that has been deleted. How can I find out more information about this deleted item?”

A: If the item was deleted less than 13 months ago - whether it was deleted automatically or manually - you can run report 3113 to find out more information about the item. This report shows the following information about a deleted item:

- Date and time of deletion
- Item home branch
- Item current branch
- Shelving location
- Item type
- Collection code
- Call#
- Title
- Item barcode
- Item ID number
- Damaged status at time of deletion
- Lost status at time of deletion
- Withdrawn status at time of deletion
- Link to the bibliographic record – unless the bibliographic record has also been deleted
- Link to report 3009 (clicking on this link searches for the item barcode number in every patron’s fine records)

Q: “Someone returned an item that has been deleted. How do I find out if someone paid for the item?”

A: You can run report 3009 and search the fines/fees table for the entire system for any item barcode number that has been recorded in the “Description” field of the fines record - whether the item that goes with that barcode number has been deleted or not. This means that, if a patron has been automatically billed, this report will show that patron’s barcode number. However, this report will also show you any other automatically generated fees plus any automatically created credits that include that item barcode number. This report will not show you any manually created invoices or manually created credits - unless the staff member that created the invoice or credit added the barcode number of the item to the manually created invoice or credit.

CRON-JOBS

3.1 Automatic processes running on our system

3.1.1 Holds queue generation

This script runs every day at:

Table 1: Holds queue schedule

Morning/daytime	Evening/nighttime
7:52 a.m.	
8:52 a.m.	8:52 p.m.
9:52 a.m.	
10:52 a.m.	10:52 p.m.
12:52 p.m.	12:52 a.m.
2:52 p.m.	2:52 a.m.
4:52 p.m.	4:52 a.m.
6:52 p.m.	6:52 a.m.

We have a cron-job running on the server that re-builds the holds queue at regular intervals.

The purpose of this script for Next Search Catalog is to regenerate the pick-list at 1 hour intervals in the mornings and at 2 hour intervals in the afternoon so that requests for materials are spread amongst the libraries randomly and the holds queue is regenerated just before the beginning of the hour. This way, if staff print their library's holds report on the hour between 8:00 a.m. and 11:00 a.m., the report will be up-to-date.

The holds queue is randomized based on the following factors:

1. The holds queue is only randomized if multiple copies are available.
2. If an item is available at the request's pickup location that copy will always be assigned to fill the request regardless of the availability of any other copies.

The settings for this cron-job are:

```
1 52 */2 * * * nekls-koha $KOHA_CRON_PATH/holds/build_holds_queue.pl >/dev/null 2>&1
2 52 7,9 * * * nekls-koha $KOHA_CRON_PATH/holds/build_holds_queue.pl >/dev/null 2>&1
```

- 52 */2 * * * in the first line sets the schedule at 52 minutes past the hour for every even numbered hour

- 52 7,9 * * * in the second line sets the schedule to also include 52 minutes past the hour at 7:00 a.m. and 9:00 a.m.
- nekls-koha \$KOHA_CRON_PATH/holds/build_holds_queue.pl tells the server which script to execute
- >/dev/null 2>&1 prevents the script from mailing an error log to the system administrator

Examples:

1. The holds queue is random so, on average, a book available at 4 libraries should appear on one of those library's holds list 25% of the time. Since it's random, though, it's entirely possible for an item to randomly be assigned to the same holds list again, and again, and again, and again.

Example: a patron places a request on THE BRETHEREN by John Grisham to be picked up at HORTON. Copies are available at BASEHOR, LEAVENWRTH, RICHMOND, and HIAWATHA. When staff at LEAVENWRTH run the holds report at 8:00 a.m., their copy of this book is on their holds list. But they can't find their copy of this title so when the holds queue is re-built at 8:52 a.m., the book is reassigned to the RICHMOND holds queue. But RICHMOND is closed today, so no one at RICHMOND pulls the request. Since the holds queue ignores closed days, at 9:52 a.m., the request is re-assigned to RICHMOND again. And then, again, at 10:52, the request is re-assigned to RICHMOND a third time. Then at 12:52, the request is re-assigned to BASEHOR. Every time the holds queue is re-built, the process is randomized.

2. Any item attached to a bibliographic record can fill a title level request - even if its not the copy currently assigned to the request in the holds queue.

Example: a patron places a request on CODE OF THE WOOSTERS by P.G. Wodehouse to be picked up at OTTAWA. Copies are available at BONNERSPGS, SENECA, and OVERBROOK. A fourth copy is owned by EUDORA, but it is checked out and not available. Staff at OVERBROOK print their holds list at 8:00 a.m. At 8:05 a.m., a patron returns the EUDORA copy. When the EUDORA copy is checked in, the hold will be triggered for the patron at OTTAWA. When staff at OVERBROOK check in their copy, the request is not triggered because the EUDORA item is already en route to OTTAWA to fill the request.

3.1.2 Empty bibliographic record deletion

This script runs every Sunday morning at 2:20 a.m.

We have a cron-job running on the server that automatically deletes bibliographic records that were created more than two weeks ago but do not have any items attached to them.

The purpose of this script for Next Search Catalog is to remove empty bibliographic records in a timely manner so that we do not have empty records taking up space in the catalog and confusing staff or patrons.

This cron-job covers three situations for us:

1. In practice, when cataloging staff delete all of the items attached to a bibliographic record, they should also delete the bibliographic record - sometimes this does not happen.
2. Similarly, if cataloging staff add a bibliographic record to the catalog, they should add items to that record in a timely manner - but that does not happen in some circumstances.
3. It is also possible for the last item attached to a bibliographic record to be deleted automatically if the item has been marked as "Lost (more than 45 days overdue)" or "Missing (unable to locate on the shelf)" or "Withdrawn" for more than 13 months.

All three of these situations create circumstances where we have bibliographic records taking space in the catalog without any items attached to them. Bibliographic records without items can be confusing for staff and patrons because a title is visible but there are no physical items available if anyone actually wants to use a copy of that title.

The settings for this cron-job are:

```
1 20 2 * * 0 nekls-koha $HOME/drop_empty_bibs.pl --days=14 --ignore_url --silent --
→update > /dev/null
```

- 20 2 * * 0 sets the schedule at every Sunday morning at 2:20 a.m.
- nekls-koha \$HOME/drop_empty_bibs.pl tells the server which script to execute
- –days=14 tells the script to delete biblios that are more than 14 days old
- –ignore_url tells the script to ignore items that have a URL in biblioitems.url
- –silent tells the script to ignore error messages
- –update > /dev/null prevents the script from mailing an error log to the system administrator

Examples:

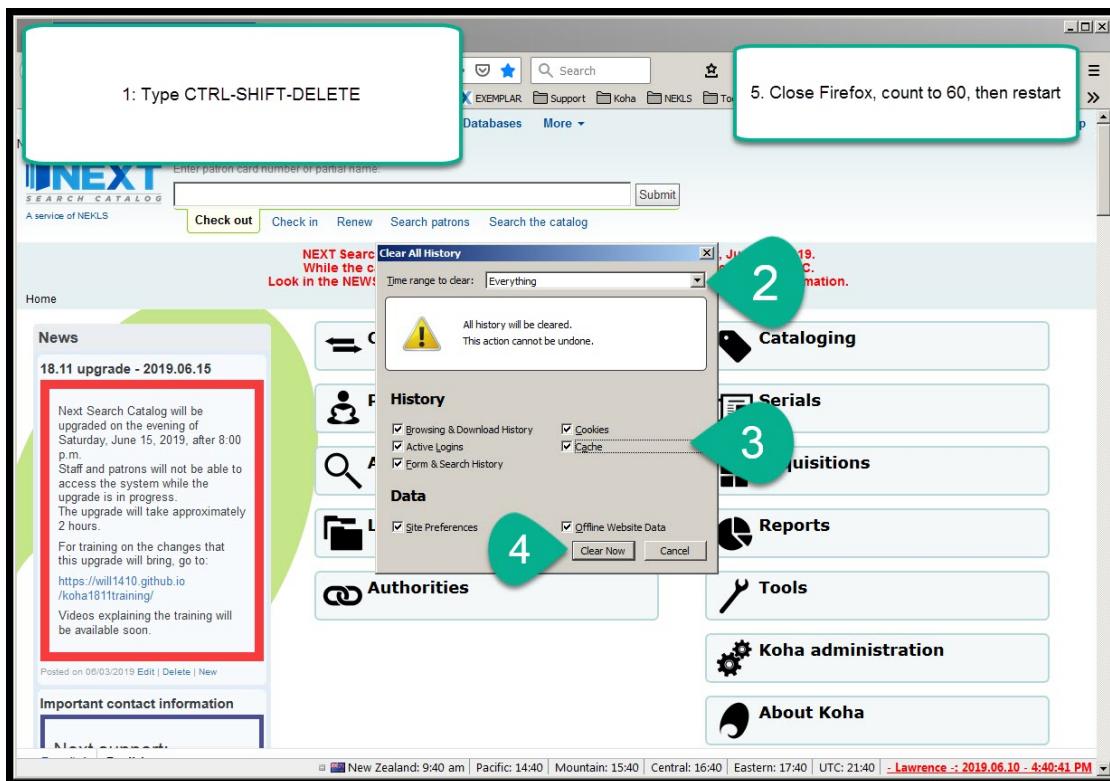
1. A bibliographic record exists for a 1975 paperback edition of DAY OF THE JACKAL by Frederic Forsythe. The bibliographic record was added to the catalog on September 9, 2005. Only one item is attached to this bibliographic record. Staff at NEKLS delete the only item attached to this bibliographic record on February 6, 2019, and they forget to delete the bibliographic record when they delete the item. This bibliographic record will be deleted at 2:20 a.m on Sunday, February 10, because the record is more than 14 days old and it has zero items attached to it.
 2. Staff at NEKLS add a bibliographic record for a new edition of THE ROLLING STONE RECORD GUIDE on March 6, 2019. If no item is attached to this record by 2:20 a.m. on March 24, the record will automatically be deleted because it is more than 14 days old and it has zero items attached to it.
 3. The only copy of FEAR AND LOATHING IN LAS VEGAS by Hunter S. Thompson has was marked as “Lost (more than 45 days overdue)” on June 1, 2018. Unless the item is found and checked in, the item will be automatically deleted on July 1, 2019. On Sunday, July 7, 2019, at 2:20 a.m., the bibliographic record will automatically be deleted because the record is more than 14 days old and it has zero items attached to it.
- search

CLEARING THE CACHE ON YOUR BROWSER

4.1 Firefox - Method #1

To clear the cache in Firefox:

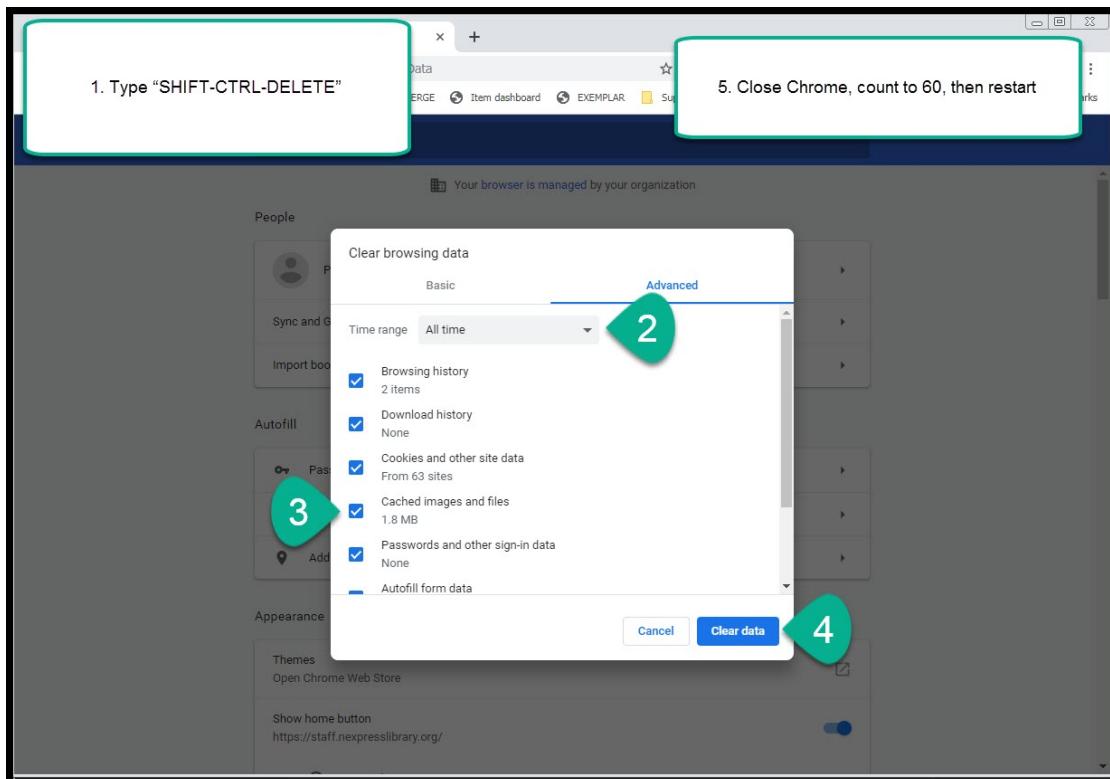
1. Start Firefox and type “SHIFT-CTRL-DELETE” to bring up the “Clear All History” window
2. Make sure the “Time range to clear” drop down says “Everything”
3. Make sure the “Cache” checkbox is checked
4. Click on the “Clear now” button
5. Click on the X to close Firefox
6. Wait 60 seconds then re-start Firefox



4.2 Chrome - Method #1

To clear the cache in Chrome:

1. Start Chrome and type “SHIFT-CTRL-DELETE” to bring up the “Clear browsing data” window
2. Make sure the “Time range” drop down says “all time”
3. Make sure the “Cached images and files” checkbox is checked
4. Click on the “Clear data” button
5. Click on the X to close Chrome
6. Wait 60 seconds then re-start Chrome

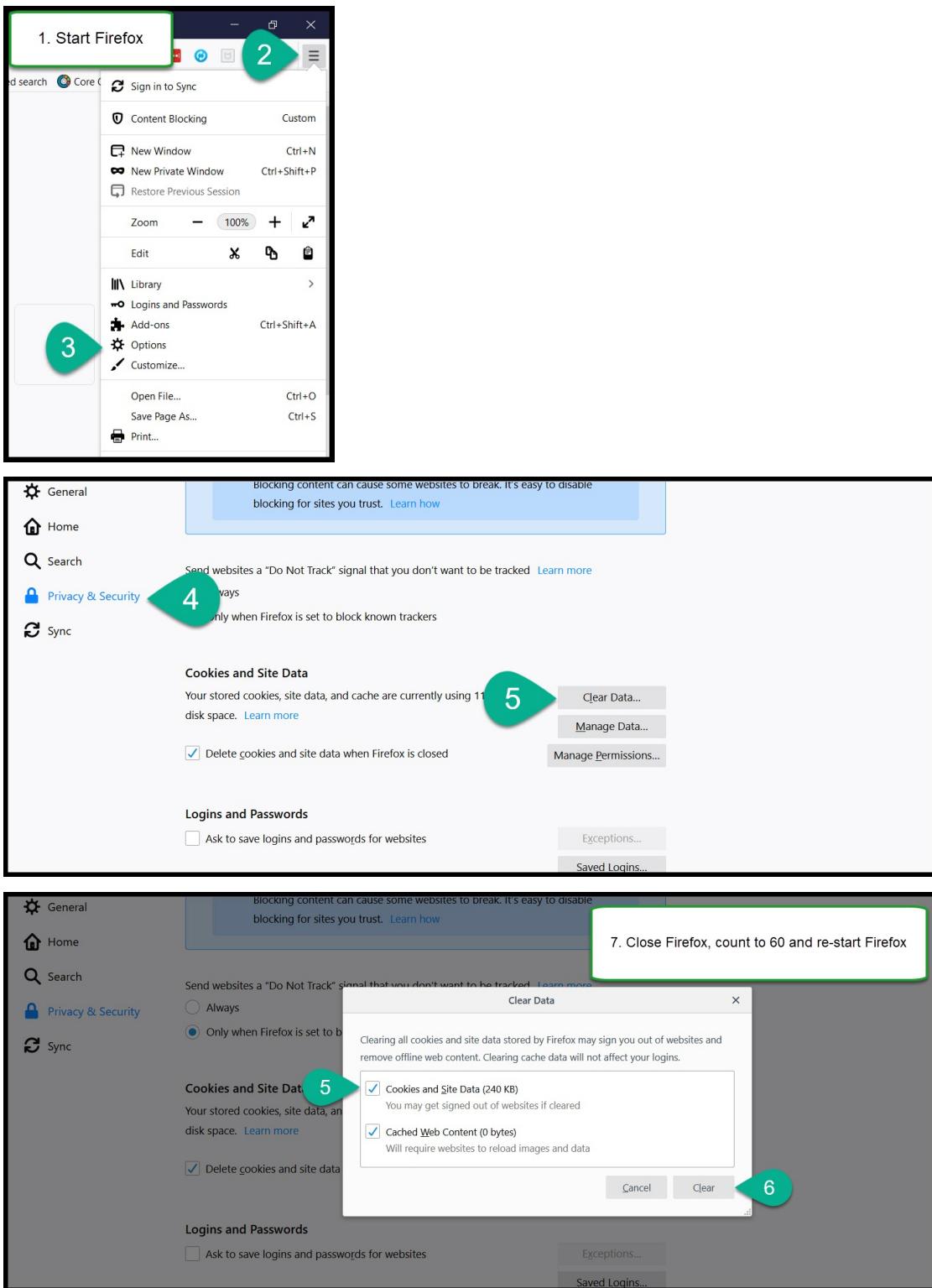


4.3 Firefox - Method #2

An alternative way of clearing the cache in Firefox:

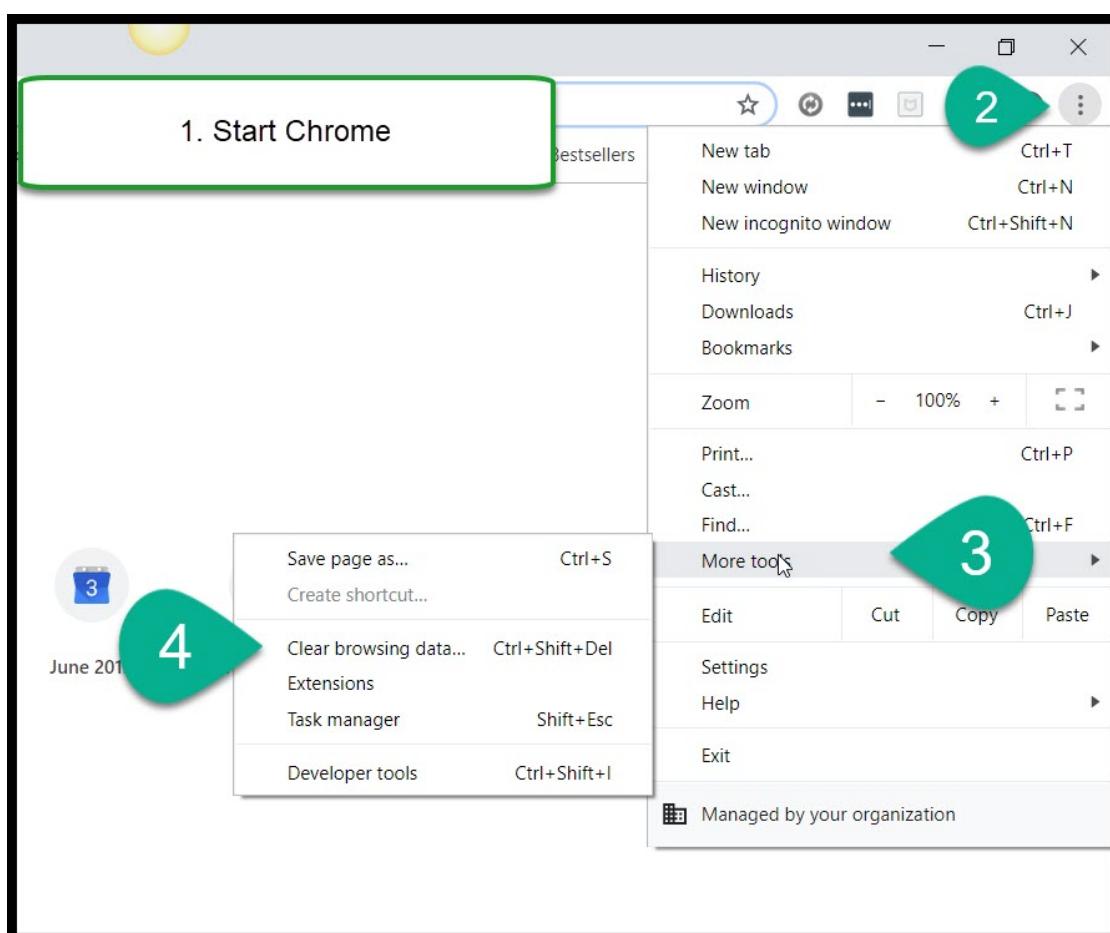
1. Start Firefox
2. Click on the options menu icon on the upper right hand side of the browser
3. Click on “Options”
4. Click on “Privacy & Security” on the left hand side of the screen
5. Scroll down to “Cookies and Site Data”
6. Click on “Clear data” and make sure “Cached Web Content” is checked
7. Click on “Clear”
8. Click on the X to close Firefox

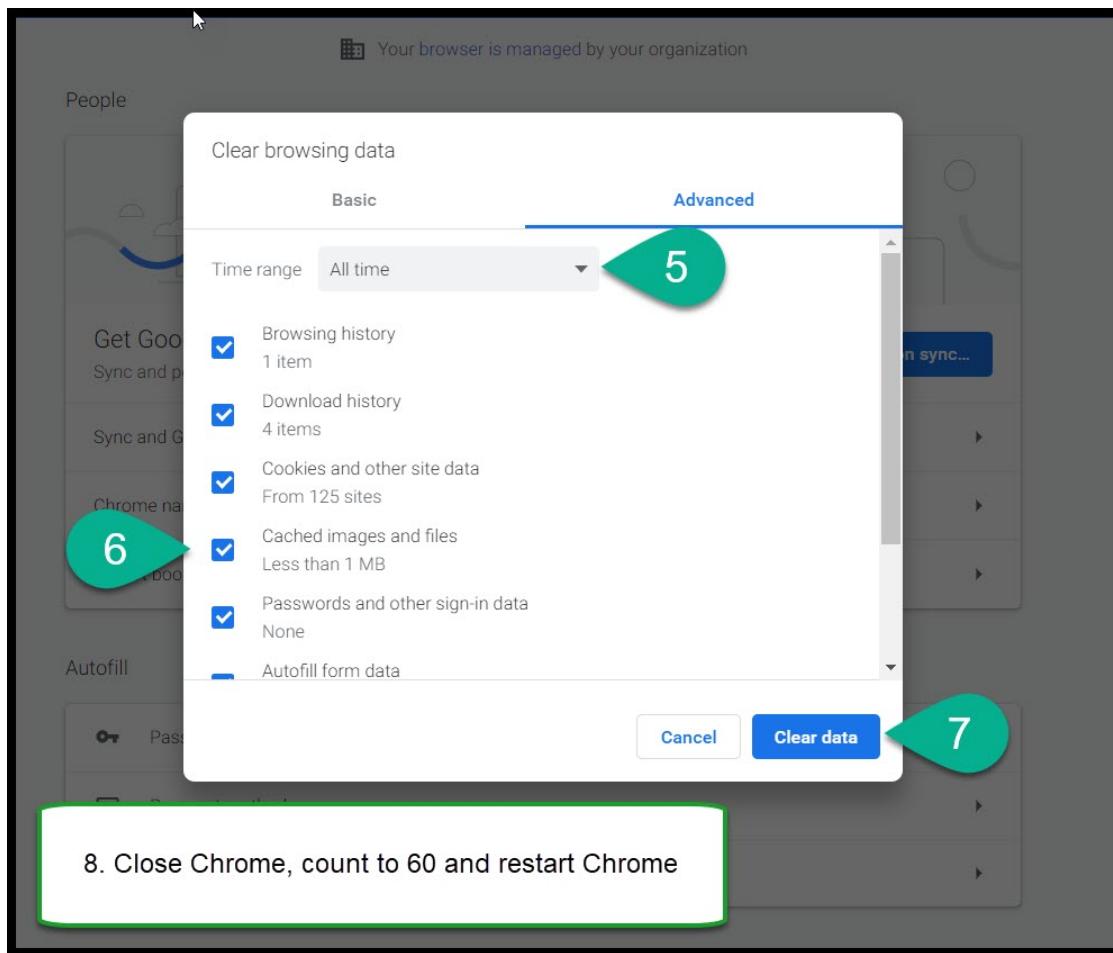
9. Wait 60 seconds then re-start Firefox


4.4 Chrome - Method #2

An alternative way of clearing the cache in Chrome:

1. Start Chrome
2. Click on the “Customize and control Google Chrome” icon
3. Hover on “More tools”
4. Click on “Clear browsing data”
5. Make sure the “Time range” drop down says “All time”
6. Make sure the “Cached images and files” checkbox is checked
7. Click on the “Clear browsing data”
8. Click on the X to close Chrome
9. Wait 60 seconds then re-start Chrome

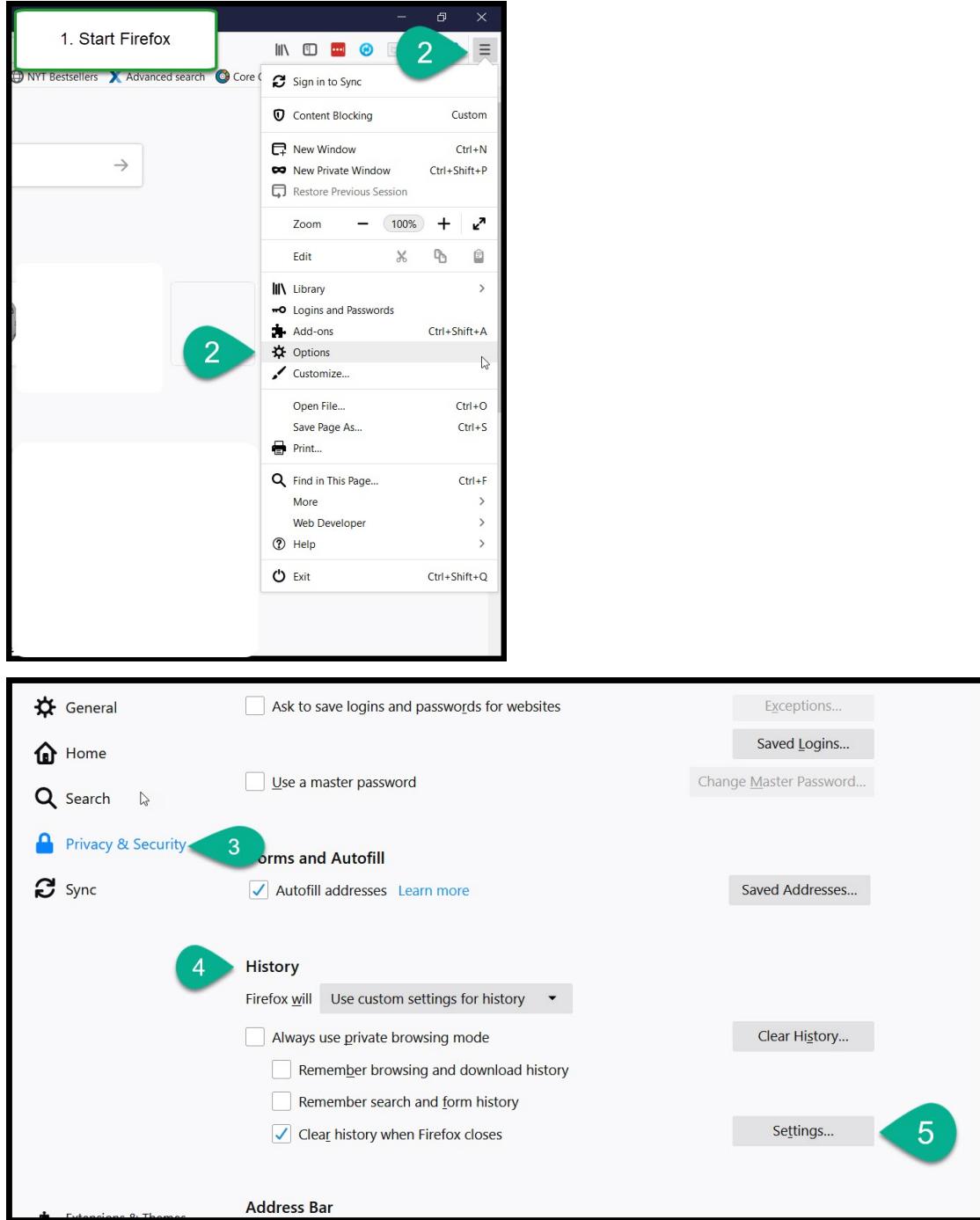


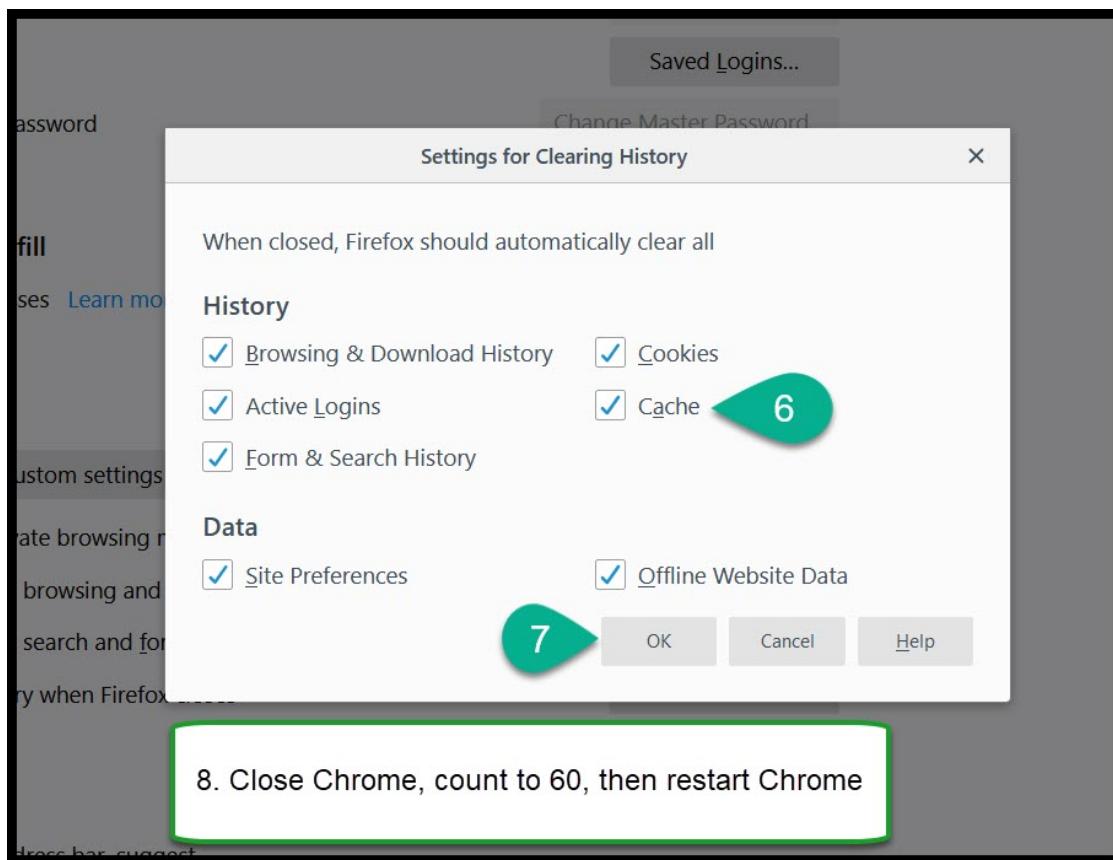


4.5 Firefox - Method #3

If you follow this method, you should never need to clear your Firefox cache again

1. Start Firefox
2. Click on the options menu icon on the upper right hand side of the browser #. Click on “Options”
3. Click on “Privacy & Security” on the left hand side of the screen
4. Scroll down to “History”
5. Click on “Settings”
6. In the section marked “History” make sure “Cache” is checked
7. Click “OK”
8. Click on the X to close Firefox
9. Wait 60 seconds then re-start Firefox





This method tells Firefox to clear its own cache every time you close Firefox. As far as overall privacy and confidentiality goes, checking all of the boxes under “Settings for Clearing History” is the best practice. It prevents anyone from accessing any data your web browser stores. For most users, however, the convenience of having Firefox store your passwords and browsing preferences outweighs most user’s privacy concerns.

4.6 Chrome - Method #3

The built-in method for Chrome to automatically clear cached data is not effective. However, there is a Chrome extension called “Click and Clean” that will allow you to tell Chrome to delete the cache (as well as other sensitive data) every time you close Chrome.

Click and Clean can be downloaded at <https://chrome.google.com/webstore/detail/clickclean/ghgabhipcejejjmhchfonmamedcbeod>. Once it's installed find the “Options” button Then click the checkbox next to “Delete private data when Chrome closes”

4.7 What is the browser cache

Your browser’s cache is a temporary storage space on your local computer where data from websites is stored. The stored data can include:

- images
- web pages and HTML
- CSS
- JavaScript

- other data associated with web pages you've visited

Your browser's cache speeds up browsing the internet by storing files on your local computer so that your computer doesn't have to download the same files again and again and again when surfing the web. By storing data that doesn't change often on your local computer, when you load pages from the same site that have the same pictures, color schemes, and overall structure, your computer only has to download new content and it can recycle the content that remains static from the cache on your local computer.

4.8 So why is this a problem

The problem arises because Koha relies heavily on HTML, CSS, JavaScript, and jQuery that can change drastically during an upgrade. When we move from 1 version of Koha to another during an upgrade, if any of the old version's HTML, CSS, JavaScript, or jQuery remains cached on your local computer, it can cause problems when your computer tries to load pages from the new version of Koha. If the JavaScript has changed, and your web browser tries to execute a cached function that no longer works, Koha won't work correctly.

This is why you need to clear your browser's cache after every Koha upgrade.

- search