
Next Search Catalog Staff Training Documentation

NEKLS Staff

Mar 28, 2019

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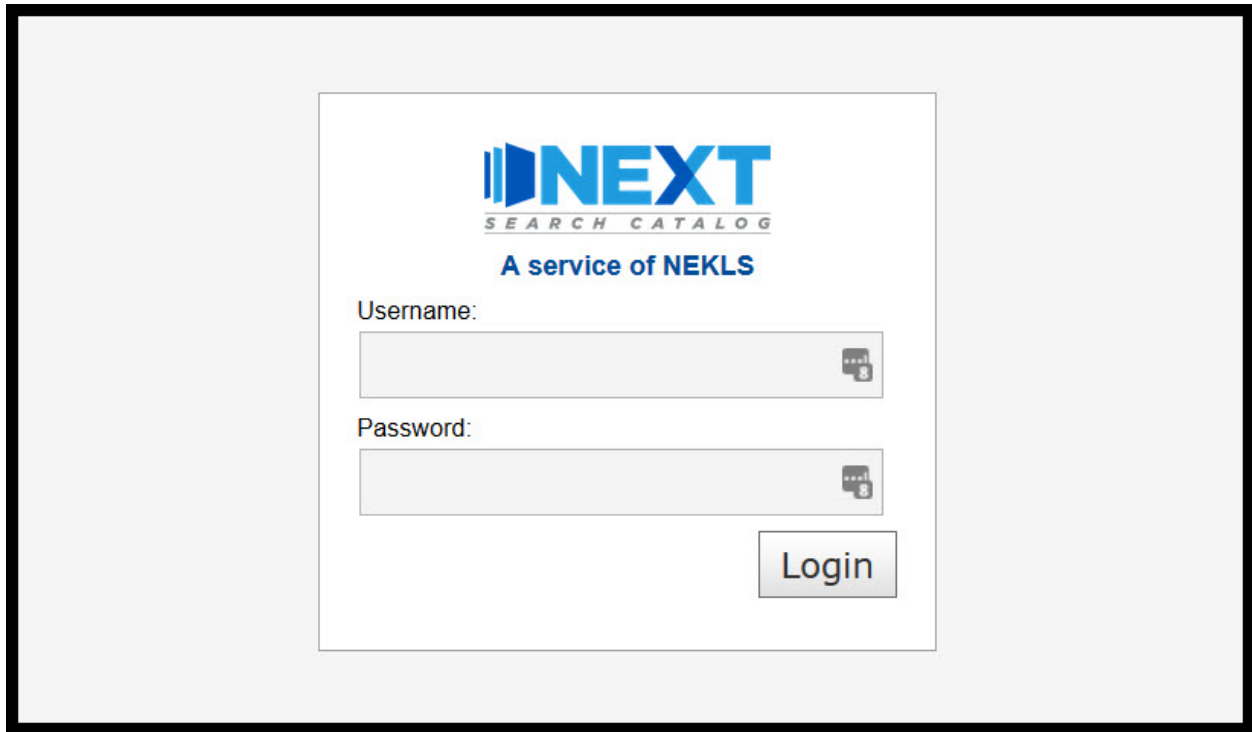
BASIC STAFF TRAINING

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

The image shows a login form for the Next Search Catalog. The form is centered on a light gray background. At the top of the form is the logo for "NEXT SEARCH CATALOG" in blue, with "NEXT" in a larger font and "SEARCH CATALOG" in a smaller font below it. Below the logo is the text "A service of NEKLS" in blue. Underneath this is the label "Username:" followed by a text input field. To the right of the input field is a small icon of a speech bubble with the number 8 inside. Below the username field is the label "Password:" followed by another text input field. To the right of this field is a similar speech bubble icon with the number 8. At the bottom right of the form is a button labeled "Login".

NEXT
SEARCH CATALOG
A service of NEKLS

Username:

Password:

Login

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 displays the Next Search Catalog staff client home page. The top navigation bar includes links for Circulation, Patrons, Search, Cart, OPAC, Helpful Links, Databases, and More. A search bar is located at the top left, and the user is logged in as TESTINGADMIN | Northeast Kansas Library System. The main content area is divided into several sections:

- News:** A section on the left with a highlighted announcement titled "April Users Group Meeting". The announcement states: "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." Below this, there are links for "Important links for Northeast Kansas Library System" and "Important contact information" (Next support: nexthelp@nekls.org).
- Central Column:** A column of buttons for various library functions: Circulation, Patrons, Advanced search, Lists, Course reserves, and Authorities.
- Right Column:** A column of buttons for administrative functions: Cataloging, Serials, Acquisitions, Reports, Tools, Koha administration, and About Koha.
- Bottom Section:** A section titled "Next: staff client" with links for "Statistics - 2019", "Locked accounts", and "Statistics - 2018".

Things to note:

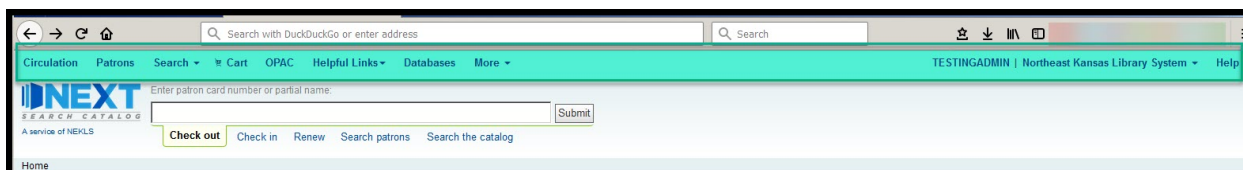
1. In upper right hand corner of every page you'll see the username you've used to log in and the library that you are logged in at
2. Which modules you see will depend on your security level - the TESTINGADMIN account we've used to log in to create these screenshots has the highest security level possible
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 displays the Next Search Catalog home page. At the top, a navigation bar includes links for Circulation, Patrons, Search, Cart, OPAC, Helpful Links, Databases, and More. The user is logged in as TESTINGADMIN at the Northeast Kansas Library System. A search bar is present with a 'Submit' button. Below the navigation bar, the page is divided into several sections. On the left, a 'News' section features a post about the April Users Group Meeting, highlighted with a red box and a green circle '3'. Below the news, there are 'Important links for Northeast Kansas Library System' and 'Important contact information' sections. The main content area is divided into two columns of modules. The left column includes Circulation, Patrons, Advanced search, Lists, Course reserves, and Authorities. The right column includes Cataloging, Serials, Acquisitions, Reports, Tools, Koha administration, and About Koha. A green circle '2' is placed between these two columns. At the bottom of the main content area, there is a 'Next: staff client' section with links for Statistics - 2019, Locked accounts, and Statistics - 2018, highlighted with a green box and a green circle '4'. A status bar at the bottom shows 'Suggestions pending approval: 306' and 'Patrons requesting modifications: 6'. The page footer includes language options for Español and English.

1.4 Useful things to know

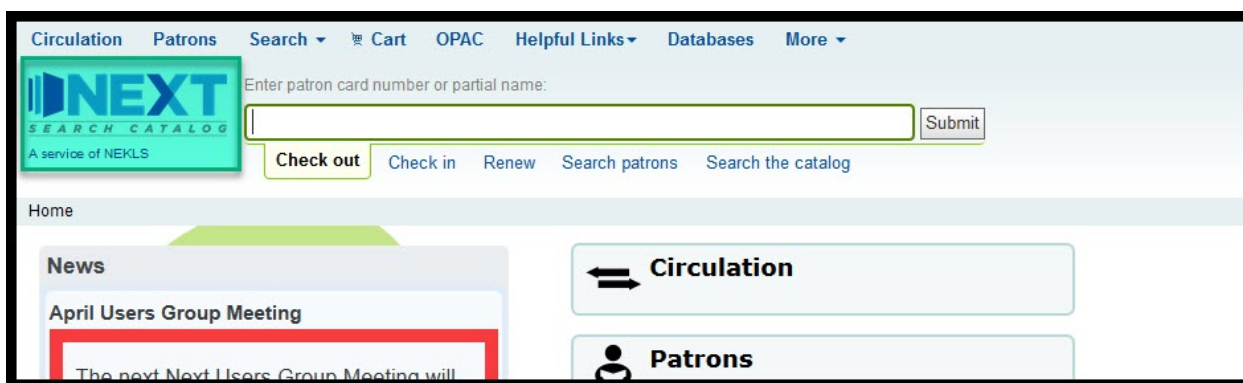
1.4.1 Page header

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:

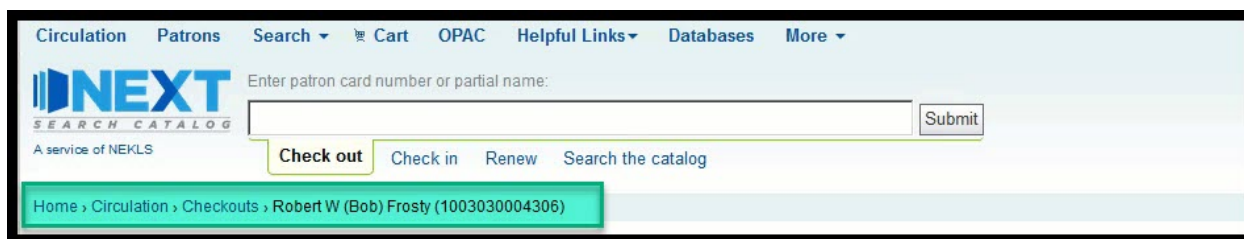


On the home page, you can switch from Check out to Check in to Renew to Search Patron to Search the catalog all by clicking on the text under the input box.

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

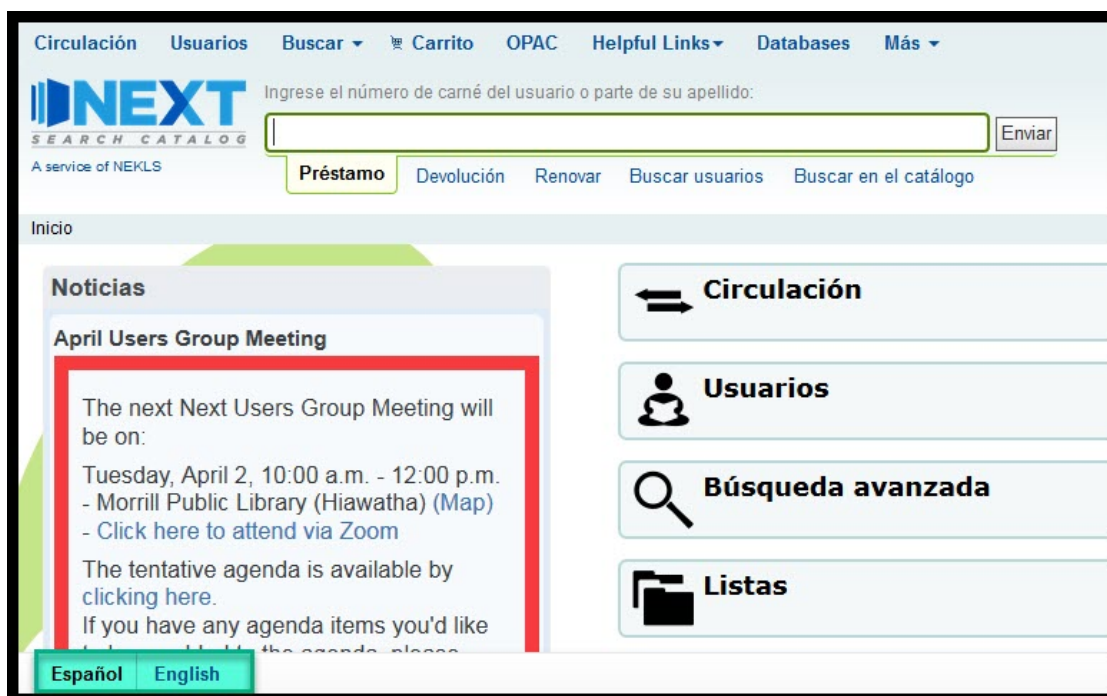
Breadcrumbs appear on every page in the staff client. This allows you to easily see which module and what function of that module you are using.



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 reshelved.

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

The screenshot shows the 'Next Search Catalog' staff interface. At the top, there's a navigation bar with links like 'Circulation', 'Patrons', 'Search', 'Cart', 'OPAC', 'Helpful Links', 'Databases', and 'More'. The user is logged in as 'TESTINGADMIN | Northeast Kansas Library System'. Below the navigation bar, there's a search bar with the placeholder 'Enter patron card number or partial name:' and a 'Submit' button. The main content area is titled 'Home > Circulation > Check in'. On the left, there's a sidebar with a 'Circulation' menu containing 'Check out', 'Check in', and 'Renew'. Below that is a 'Circulation reports' section with links like 'Holds queue', 'Holds awaiting pickup', 'Hold ratios', 'Transfers to receive', 'Overdues', and 'Overdues with fines'. The main content area has a 'Check in' section with a text input field labeled 'Enter item barcode:' containing the value '0003008201806' and a 'Submit' button. To the right of this is an 'Options' section with two checkboxes: 'Forgive overdue charges' and 'Book drop mode'. At the bottom, there's a green-bordered box with the text 'Enter the barcode number of the item you wish to check-in here'. A green arrow points from this box up to the 'Enter item barcode:' input field.

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. A search bar at the top allows entering a patron card number or partial name. Below the search bar, there are links for 'Check out', 'Renew', and 'Search the catalog'. The 'Check in' section has a form to enter the item barcode and a 'Submit' button. To the right, there are 'Options' for 'Forgive overdue charges' and 'Book drop mode'. The 'Checked-in items' table is displayed below, showing a single item checked in.

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 with a yellow pop-up message indicating that the item is not checked out. The 'Checked-in items' table shows two items, one of which is 'Not checked out'.

Check in message

0003008001921: Managing projects with Make /

Not checked out.

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.

Hold found:
0003008201826: *The nun*

Notes: This is a note for testing purposes
Hold for:
Frosty, Robert W - 1003030004306 - Adult
1616 Pumpkin Vine Ln
Lawrence, KS 66047
208-669-4258
george+frosty@nekls.org
Patron notification: Email.

Hold at Northeast Kansas Library System

✓ Confirm hold 🖨️ Print slip and confirm ✖ Ignore

Use "Confirm hold" or "Print slip and confirm" following the procedures used at your library

Due date	Title	Type	Patron	Note
Not checked out	<i>The nun</i>	MOVIES DVD	Not checked out	
Not checked out	<i>The Meg</i>	MOVIES DVD	Not checked out	
04/17/2019 23:59	<i>The nun</i>	MOVIES DVD	Frosty, Marlene Tova (Adult)	

- 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

Hold found:
0003008201806: The Meg

Notes: Test request for training. GHW
Hold for:
 Frosty, Robert W - 1003030004306 - Adult
 1616 Pumpkin Vine Ln
 Lawrence, KS 66047
 208-669-4258
 george+frosty@nekls.org
Transfer to: Overbrook Public Library

Buttons:

Use "Confirm hold and transfer" or "Print slip, transfer, and confirm" following the procedures used at your library

Due date	Title	Call number	Type	Patron	Note
Not checked out	The Meg		MOVIES DVD	Not checked out	
04/17/2019 23:59	The nun		MOVIES DVD	Frosty, Marlene Tova (Adult)	Checkouts: 1
Not checked out	Managing projects	Oram, 0003008001921	PROG 005 4	BOOK Professional	Not checked out

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

Please return item to: Atchison Public Library
 0003008201821: Mission: Impossible - Fallout

Buttons:

Options:
☐ Forgive overdue charges
☐ Book drop mode

Send the item via courier to its home library.
 Slips printed by this button will include the Kansas Library Express number for the library you are shipping the item to

Due date	Title	Author	Library System	Library System	Type	Patron	Note
04/17/2019 23:59	Mission: Impossible - Fallout		Library System	Library System	DVD	Frosty, Marlene Tova (Adult)	
Not checked out	The nun				DVD	Not checked out	
Not checked out	The Meg		0003008201806	Northeast Kansas	MOVIES DVD	Not checked out	

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 'Check in' page of the Next Search Catalog. A yellow message box is displayed, stating: 'Check in message', '0003008201806: The Meg', 'Item was lost, now found.', 'A refund has been applied to the borrowing patron's account.', and 'Not checked out.' Below the message box, there is a 'Check in' section with a text input field for 'Enter item barcode:' and a 'Submit' button. To the right, there is an 'Options' section with checkboxes for 'Forgive overdue charges' and 'Book drop mode'. Below these sections, there is a 'Checked-in items' table with columns: Due date, Title, Author, Barcode, Home library, Holding library, Shelving location, Call number, Type, Patron, and Note. The table shows one item: 'The Meg' with barcode '0003008201806', held by 'Northeast Kansas Library System'.

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 'Check in' page of the Next Search Catalog. A blue message box is displayed, stating: 'Patron note', '03/27/2019', 'Title: Mission: Impossible - Fallout', 'Item BC: 0003008201821', 'Home library: Northeast Kansas Library System', and 'The patron says: This DVD is scratched and wouldn't play right'. Below the message box, there are two buttons: 'Print this note' and 'Email this note to the home library'. Below these buttons, there is a text box with the instruction: '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.' Below the text box, there is a 'Check in' section with a text input field for 'Enter item barcode:' and a 'Submit' button. To the right, there is an 'Options' section with checkboxes for 'Forgive overdue charges' and 'Book drop mode'. Below these sections, there is a 'Checked-in items' table with columns: Column visibility, Excel, CSV, Copy, and Print.

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.

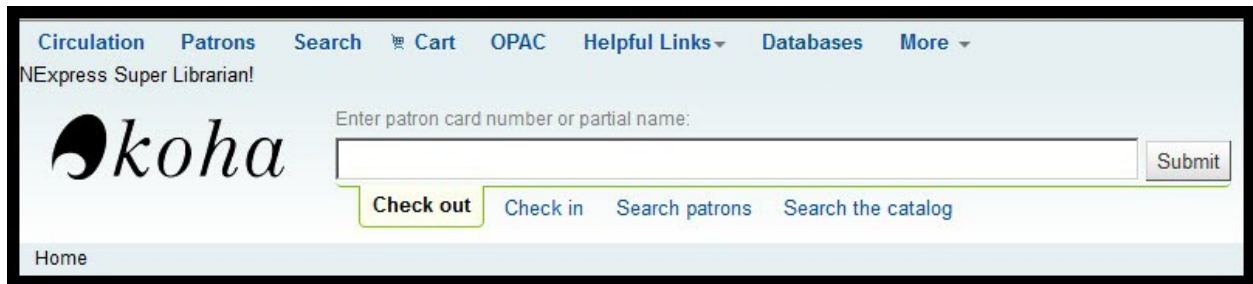
The screenshot shows the Next Search Catalog interface. At the top, there's a navigation bar with links like Circulation, Patrons, Search, Cart, OPAC, Helpful Links, Databases, and More. The user is logged in as TESTINGADMIN | Northeast Kansas Library System. Below the navigation bar, there's a search bar with the text "Enter patron card number or partial name:" and a "Submit" button. To the left of the search bar, there's a "Check out" button and a "Renew" button. Below the search bar, there's a "Check in" button and a "Search the catalog" button. In the center of the page, there's a yellow box with a green border that says "Check in message" and "No item with barcode: 00106000338066". To the left of this box, there's a "Check in" button and a "Submit" button. To the right of this box, there's an "Options" button with two checkboxes: "Forgive overdue charges" and "Book drop mode". Below the "Check in message" box, there's a "Checked-in items" section with a table. The table has columns for Due date, Title, Author, Barcode, Home library, Holding library, Shelving location, Call number, Type, Patron, and Note. The table contains one row of data.

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)	

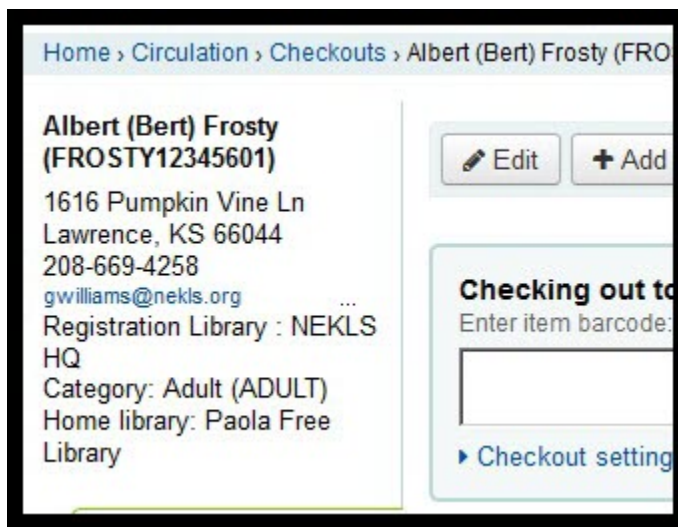
If the item was deleted within the previous 13 months, you can find out basic information about the item by running report 3113. If you wish to find any fines/fees history you can run report 3009.

1.6 Checking items out

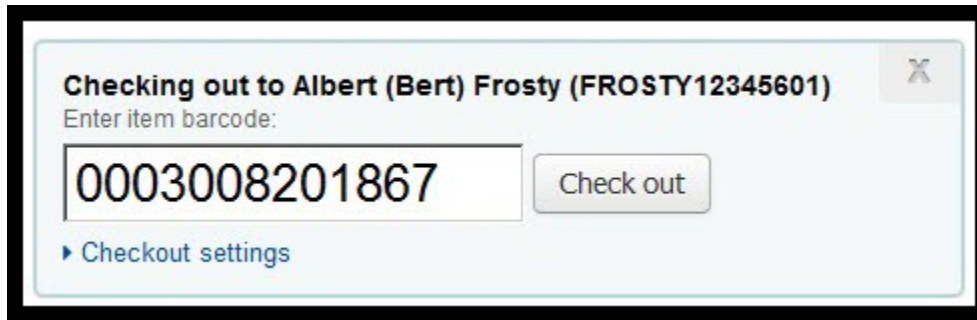
Access the patron's account



Make sure you've got the correct account



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



Checking out to Albert (Bert) Frosty (FROSTY12345601) ✕

Enter item barcode:

[▶ Checkout settings](#)

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

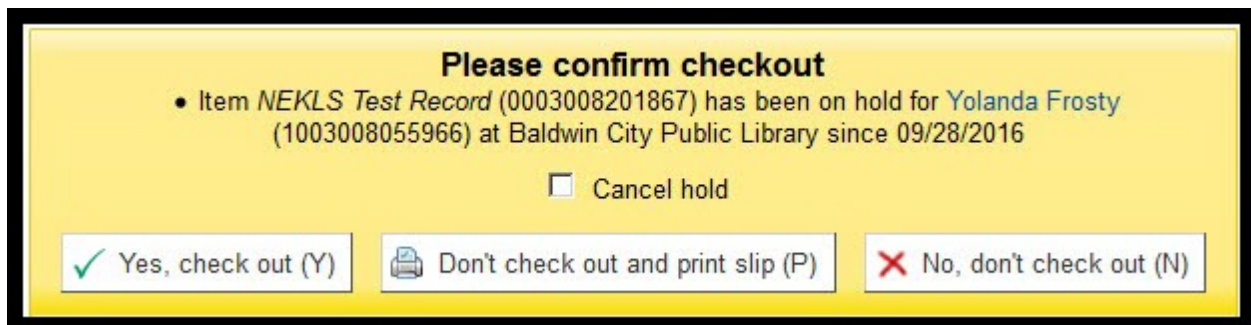


Checked out: NEKLS Test Record (0003008201867). Due on 11/30/2016

1 Checkout(s)

Due date	Title	Item
Today's checkouts		
11/30/2016	NEKLS Test Record by Test, Author. 0003008201867	FLOATING (SLK)

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



Please confirm checkout

- Item *NEKLS Test Record* (0003008201867) has been on hold for Yolanda Frosty (1003008055966) at Baldwin City Public Library since 09/28/2016

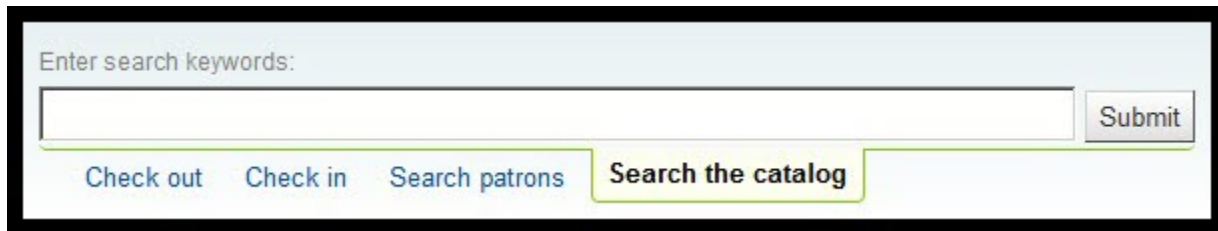
☐ Cancel hold

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

The screenshot displays a web-based library system interface. On the left, a 'Print' dropdown menu is open, showing options: 'Print summary', 'Print slip' (highlighted in blue), and 'Print quick slip'. Below this menu is a link that says 'Add a new message'. The main area of the interface is titled 'Checking out to Albert (Bert) Frosty (FROSTY12345601)' and includes a close button (X). Below the title, there is a label 'Enter item barcode:' followed by a text input field. To the right of the input field is a button labeled 'Check out', which is highlighted with a red rectangular border. At the bottom left of the main area, there is a link that says '▶ Checkout settings'.

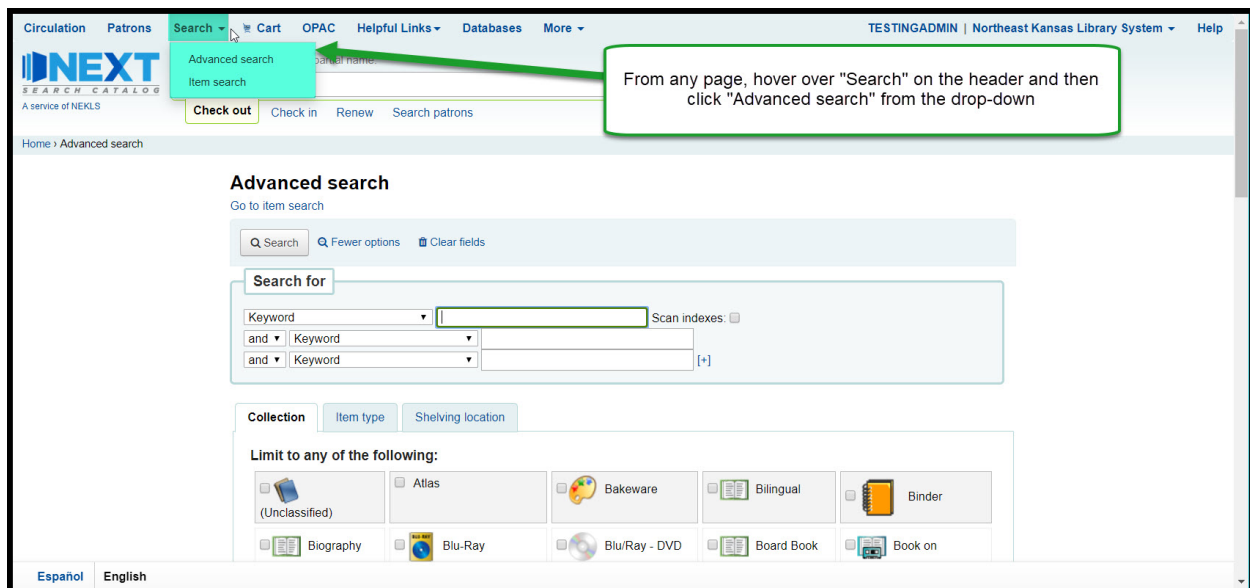
1.7 Searching the catalog

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



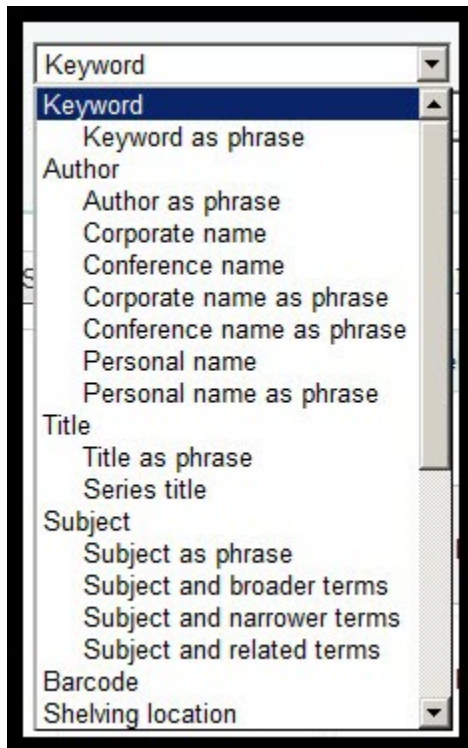
The screenshot shows a search interface with a light blue header. At the top, it says "Enter search keywords:" followed by a large white text input field. To the right of the input field is a grey "Submit" button. Below the input field, there are four buttons: "Check out", "Check in", "Search patrons", and "Search the catalog". The "Search the catalog" button is highlighted with a green border.

The advanced search page offers you more flexibility for searching.

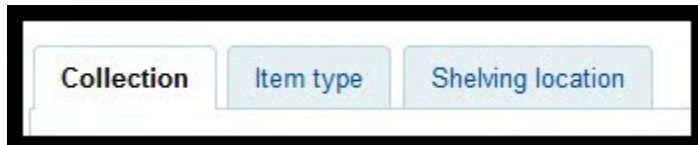


The screenshot shows the "Advanced search" page. At the top, there is a navigation bar with links: "Circulation", "Patrons", "Search", "Cart", "OPAC", "Helpful Links", "Databases", and "More". The "Search" link is highlighted with a green box, and a green arrow points from a text box to it. The text box contains the instruction: "From any page, hover over 'Search' on the header and then click 'Advanced search' from the drop-down". Below the navigation bar, the "Advanced search" page is displayed. It has a "Search for" section with three input fields for "Keyword", "and", and "Keyword". Below this, there are tabs for "Collection", "Item type", and "Shelving location". Under the "Collection" tab, there are several checkboxes for different collection types: "(Unclassified)", "Atlas", "Bakeware", "Bilingual", "Binder", "Biography", "Blu-Ray", "Blu-Ray - DVD", "Board Book", and "Book on". At the bottom left, there are links 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)

A screenshot of two search filter sections. The top section is labeled 'Year:' and contains a text input field with a calendar icon to its right. To the right of the input field is the text '(format: yyyy-yyyy)'. The bottom section is labeled 'Language:' and contains a dropdown menu with 'No limit' selected. Both sections are enclosed in light blue rounded rectangles.

Searches can also be limited by library and availability



A screenshot of a search interface showing two filter sections. The top section has a checkbox labeled "Only items currently available" which is unchecked. The bottom section is separated by a horizontal line and contains two dropdown menus. The first dropdown is labeled "Individual libraries:" and shows "All libraries" as the selected option. Below it is the word "OR". The second dropdown is labeled "Groups of libraries:" and shows "-- none --" as the selected option.

Only items currently available ☐

Individual libraries: All libraries

OR

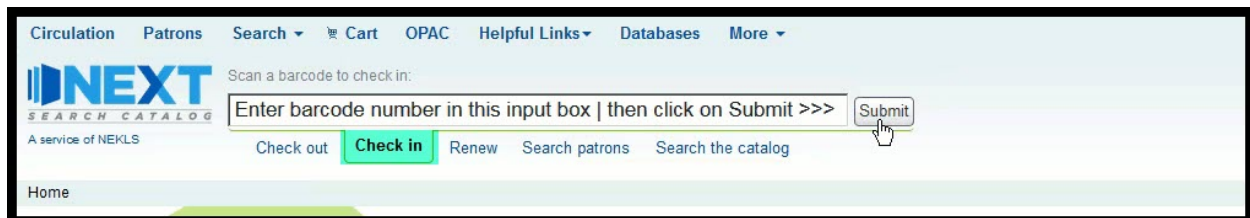
Groups of libraries: -- none --

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.



The screenshot displays the NEXST library system interface. At the top, there is a navigation bar with links: Circulation, Patrons, Search, Cart, OPAC, Helpful Links, Databases, and More. Below this, the NEXST logo is visible, along with the text "A service of NEKLS". The main area features a "Scan a barcode to check in:" prompt. Below this prompt is a text input box containing the placeholder text "Enter barcode number in this input box | then click on Submit >>>". To the right of the input box is a "Submit" button. Below the input box, there are several buttons: "Check out", "Check in" (which is highlighted in green), "Renew", "Search patrons", and "Search the catalog". A mouse cursor is pointing at the "Submit" button. At the bottom left, there is a "Home" link.

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 first screenshot shows the home page of the Next Search Catalog. The 'Circulation' button is highlighted with a red circle and the number 1. The 'News' section on the left contains a red-bordered box with the text: '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.', and 'If you have any agenda items you'd like to have added to the agenda, please email:'. The 'Circulation' button is located in the center of the page, and the 'Check in' button is located in the bottom right corner of the page.

The second screenshot shows the 'Circulation' page. The 'Check in' button is highlighted with a red circle and the number 2. The 'Check out' button is located in the top left corner of the page, and the 'Check in' button is located in the top right corner of the page. The 'Check in' button is located in the bottom right corner of the page.

The third screenshot shows the 'Check in' page. The 'Check in' button is highlighted with a red circle and the number 3. The 'Check in' button is located in the top left corner of the page, and the 'Check in' button is located in the top right corner of the page. The 'Check in' button is located in the bottom right corner of the page.

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 first screenshot shows the 'Circulation' link in the top navigation bar, highlighted with a red circle and the number 1. Below the navigation bar, the 'Search the catalog' button is also highlighted with a red circle and the number 1.

The second screenshot shows the 'Circulation' page. The 'Check in' button is highlighted with a red circle and the number 2. The page also displays 'Holds' and 'Transfer' sections.

The third screenshot shows the 'Check in' page. The 'Check in' button is highlighted with a red circle and the number 3. The page includes a form to enter the item barcode and a 'Submit' button.

- search