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# **Next Search Catalog Staff Training Documentation**

**NEKLS Staff**

**Apr 09, 2019**



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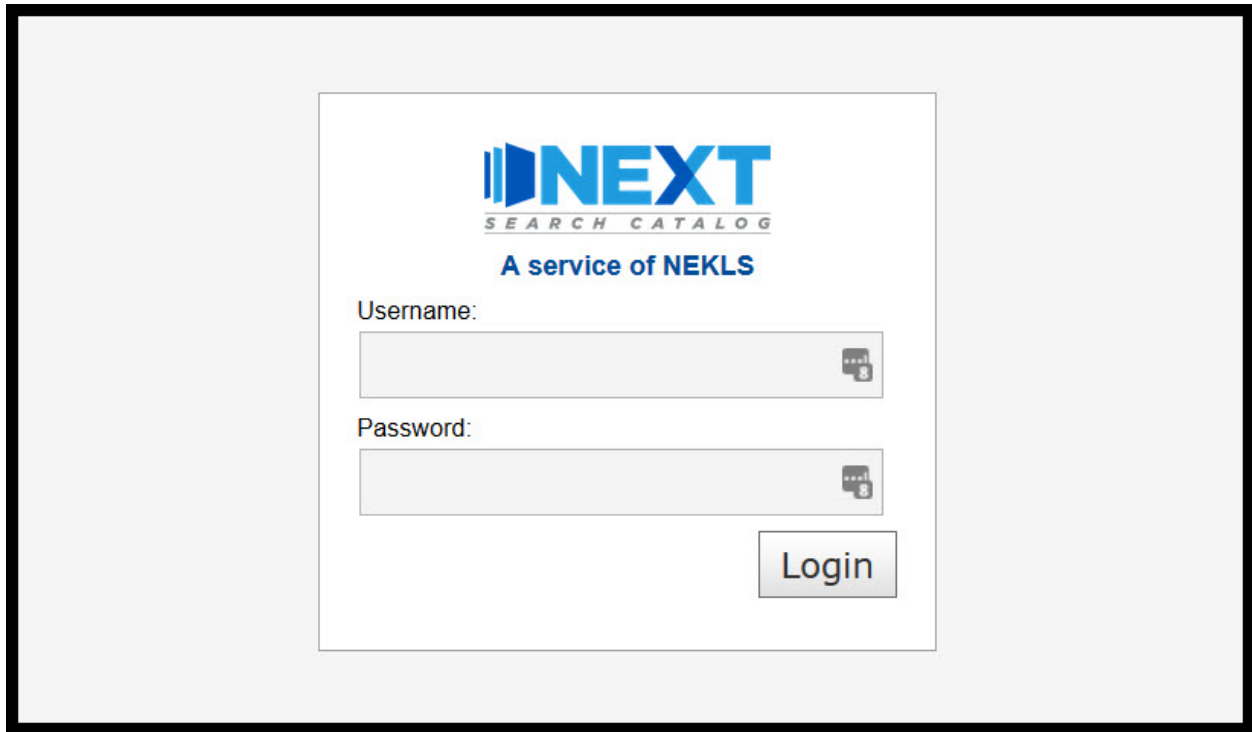
## BASIC STAFF TRAINING

### 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 screenshot shows a login interface for the Next Search Catalog. At the top, there is a logo with the word 'NEXT' in large blue letters, with 'SEARCH CATALOG' in smaller letters below it. Underneath the logo, it says 'A service of NEKLS'. Below this, there are two input fields. The first is labeled 'Username:' and the second is labeled 'Password:'. Both fields have a small icon of a speech bubble with a question mark. To the right of the password field is a button labeled 'Login'.

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 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 a user login area at the top right shows 'TESTINGADMIN | Northeast Kansas Library System' with a Help link.

The main content area is organized into several sections:

- News:** A section on the left containing a highlighted announcement for the 'April Users Group Meeting' on Tuesday, April 2, 10:00 a.m. - 12:00 p.m. at Morrill Public Library (Hiawatha). The announcement includes details about the agenda, a link to the Zoom meeting, and contact information for Next support (nexthelp@nekls.org).
- Important links for Northeast Kansas Library System:** A section below the news containing links for 'Holds report' and 'Shareit statewide ILL'.
- Important contact information:** A section at the bottom left providing the Next support email address: nexthelp@nekls.org.
- Central navigation buttons:** A column of buttons for Circulation, Patrons, Advanced search, Lists, Course reserves, and Authorities.
- Right-hand navigation buttons:** A column of buttons for Cataloging, Serials, Acquisitions, Reports, Tools, Koha administration, and About Koha.
- Statistics and Next: staff client section:** A section at the bottom right showing statistics for suggestions pending approval (306) and patrons requesting modifications (6), along with a 'Next: staff client' section containing links for Statistics - 2019, Locked accounts, and Statistics - 2018.

The page also features a footer with language options: Español and English.

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

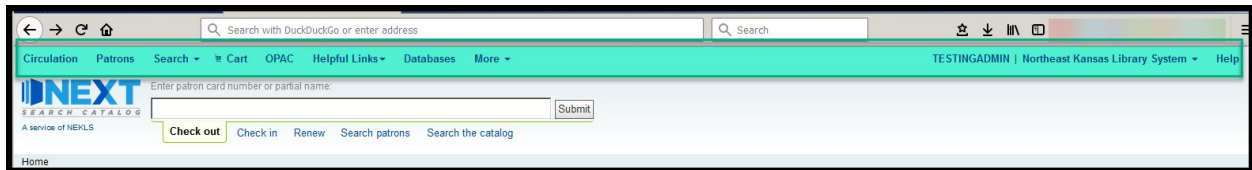
The screenshot displays the Next Search Catalog staff interface. At the top, a navigation bar includes links for Circulation, Patrons, Search, Cart, OPAC, Helpful Links, Databases, and More. The user is logged in as TESTINGADMIN at the Northeast Kansas Library System. A search bar is present with a 'Submit' button. The main content area 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 this, there are links for 'Important links for Northeast Kansas Library System' and 'Important contact information'. The central area contains a grid of module buttons: Circulation, Patrons, Advanced search, Lists, Course reserves, Authorities, Cataloging, Serials, Acquisitions, Reports, Tools, Koha administration, and About Koha. A green circle '2' is placed over the 'Advanced search' button. At the bottom, a 'Next: staff client' section shows statistics for 2019 and 2018, with a green circle '4' highlighting the 'Statistics - 2019' link. A green circle '1' is placed over the user's login information in the top right corner.



## 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:

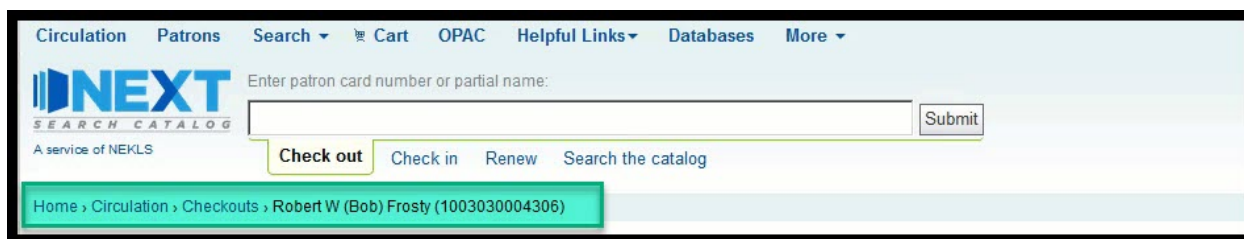


On the home page, you can switch from Check out to Check in to Renew to Search Patron to Search the catalog all by clicking on the text under the input box.

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

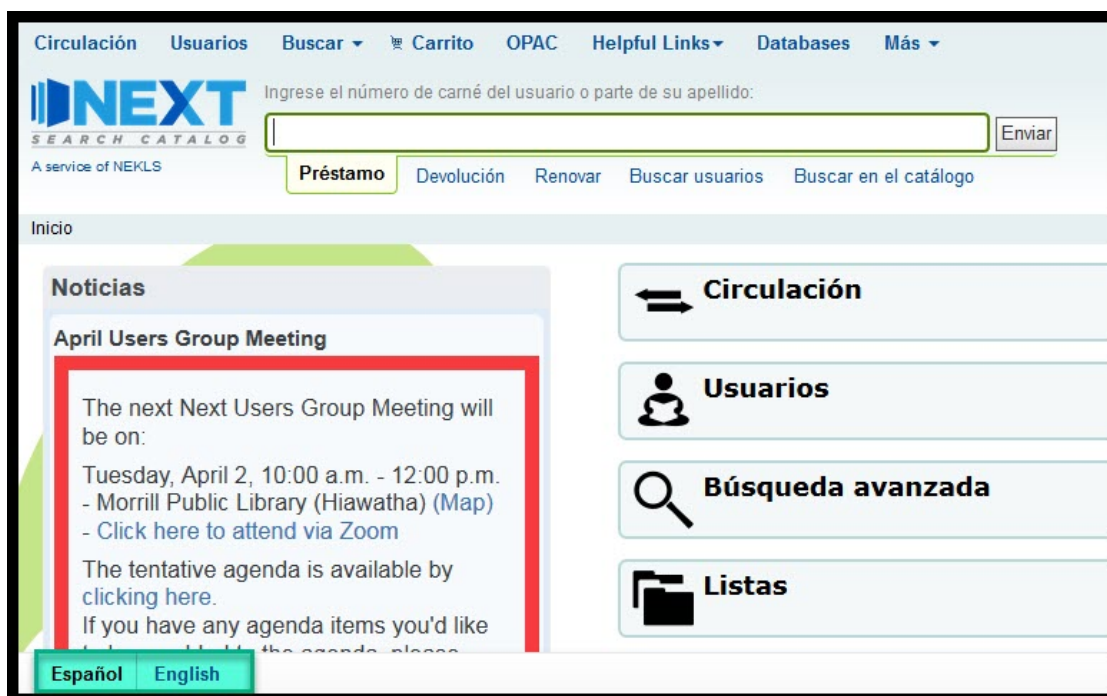
Breadcrumbs appear on every page in the staff client. This allows you to easily see which module and what function of that module you are using.



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 text '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' form with the item barcode '0003008201805' entered. 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 a yellow pop-up message: "Check in message: 0003008001921: Managing projects with Make / Not checked out." 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
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:

**Checked-in items**

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	BOOK Professional	Not checked out	

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

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

**Checked-in items**

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	

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

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 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.

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 'Checked-in items' table.

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 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.

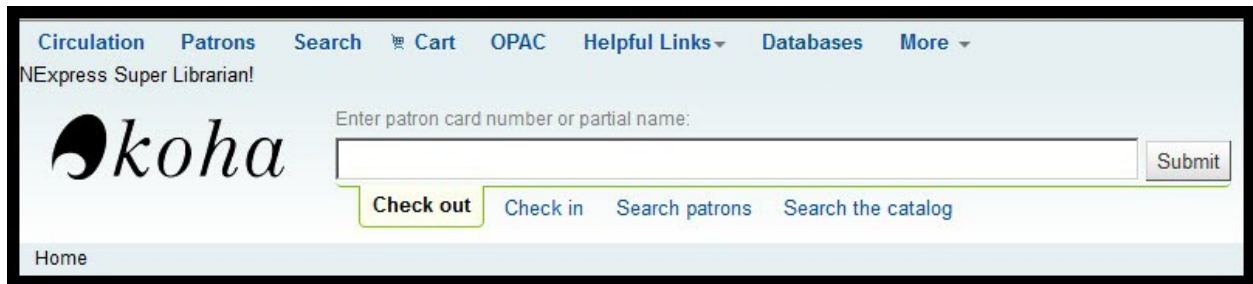
Due date	Title	Author	Barcode	Home library	Holding library	Shelving location	Call number	Type	Patron	Note
04/17/2019 23:59	Mission: Impossible - Fallout		0003008201821	Northeast Kansas Library System	Northeast Kansas Library System	Adult		MOVIES DVD	Frosty, Marlene Tova (Adult)	

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.

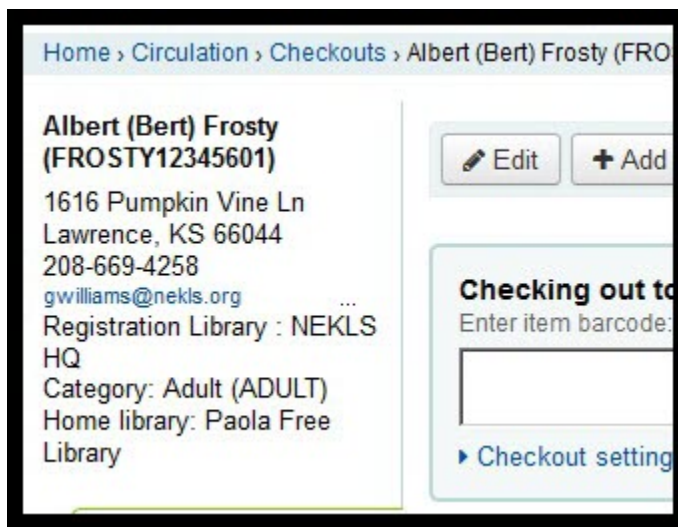


## 1.6 Checking items out

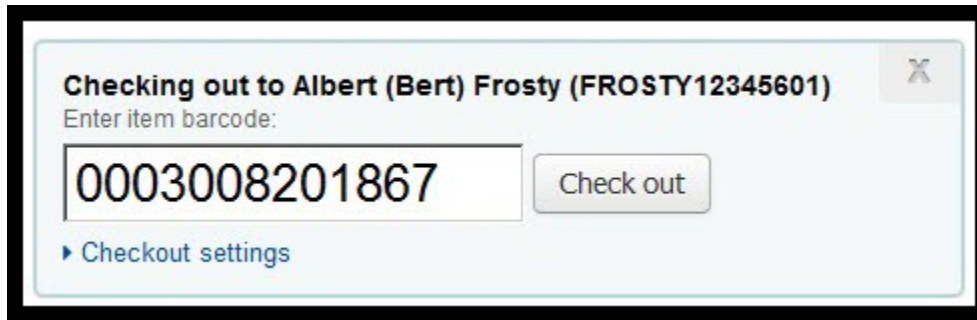
Access the patron's account



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”

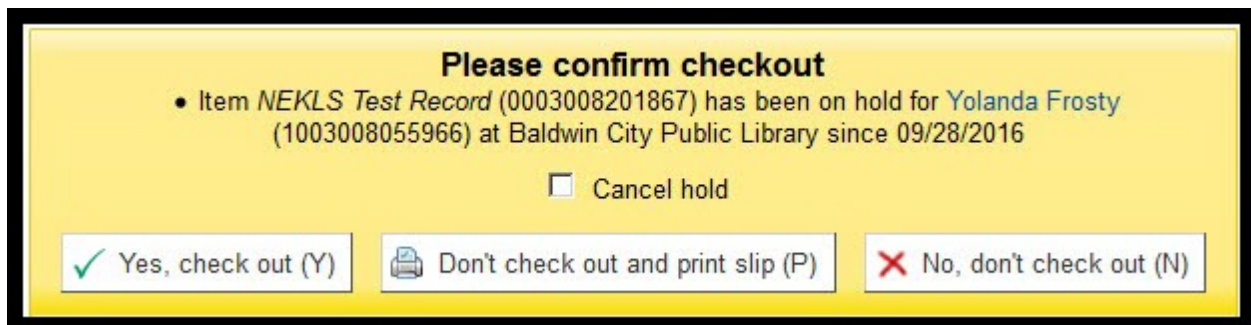


**Checked out:** NEKLS Test Record (0003008201867). Due on 11/30/2016

**1 Checkout(s)**

Due date	Title	Item
<b>Today's checkouts</b>		
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

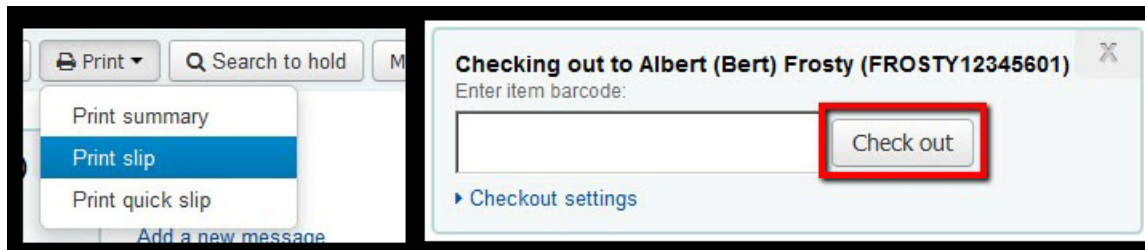


**Please confirm checkout**

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

☐ Cancel hold

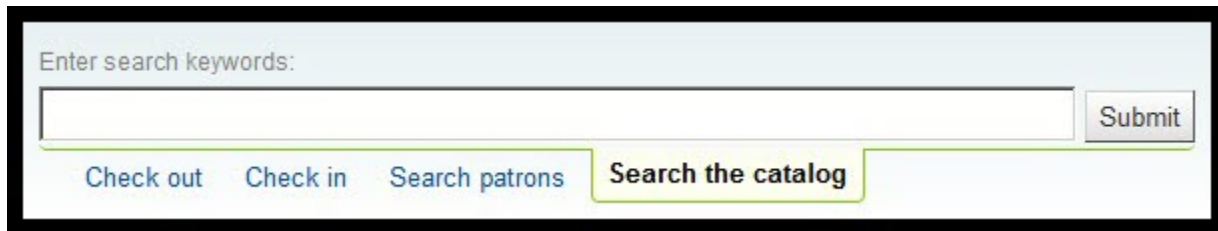
Print a receipt if needed once all items have been checked out



The screenshot displays a 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'. On the right, a window titled 'Checking out to Albert (Bert) Frosty (FROSTY12345601)' is visible. It contains a text input field labeled 'Enter item barcode:' and a 'Check out' button, which is highlighted with a red rectangle. Below the input field is a link for 'Checkout settings'.

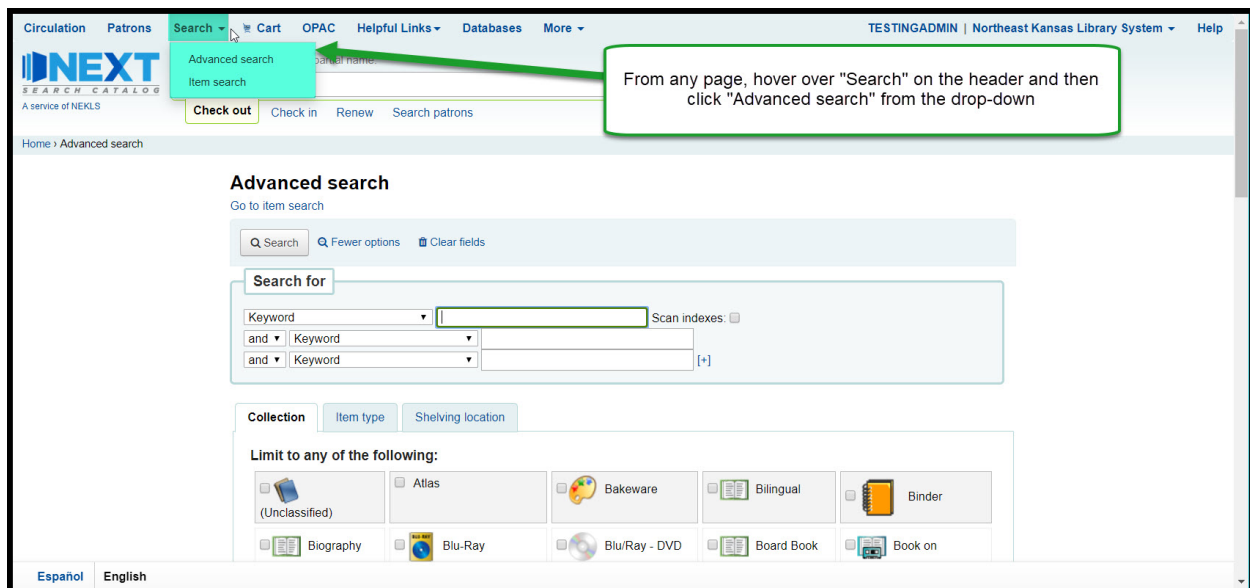
## 1.7 Searching the catalog

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



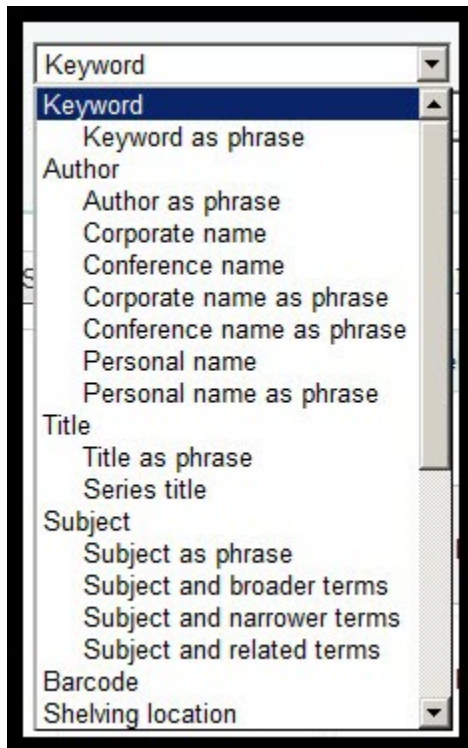
A screenshot of a web interface's search section. At the top, it says "Enter search keywords:" followed by a large text input field. To the right of the input field is a "Submit" button. Below the input field, there are four buttons: "Check out", "Check in", "Search patrons", and "Search the catalog".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

The advanced search page offers you more flexibility for searching.

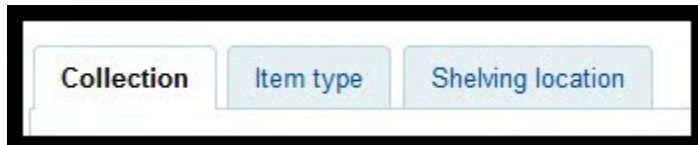


A screenshot of the "Advanced search" page. The top navigation bar includes links for "Circulation", "Patrons", "Search", "Cart", "OPAC", "Helpful Links", "Databases", and "More". The "Search" link is highlighted with a green box, and a green arrow points from a callout box to it. The callout box contains the text: "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" section is visible. It includes a "Search for" section with three input fields for "Keyword", "and", and "Keyword", each with a dropdown menu. Below this is a "Collection" section with tabs for "Collection", "Item type", and "Shelving location". The "Collection" tab is selected, showing a grid of search filters: (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 this 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

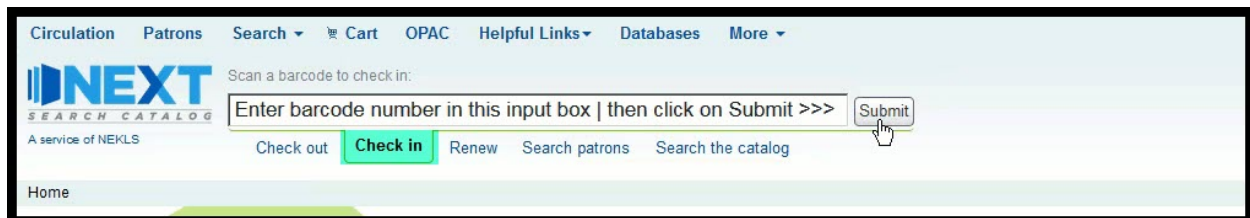
Groups of libraries: -- none --

## 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 'NEXT SEARCH CATALOG' interface, a service of NEKLS. The top navigation bar includes links for Circulation, Patrons, Search, Cart, OPAC, Helpful Links, Databases, and More. Below the navigation bar, the main content area features a 'Scan a barcode to check in:' section. This section contains a text input box with the placeholder text 'Enter barcode number in this input box | then click on Submit >>>' and a 'Submit' button. A mouse cursor is shown clicking the 'Submit' button. Below the input box, there are four buttons: 'Check out', 'Check in' (highlighted in green), 'Renew', and 'Search patrons'. At the bottom left, there is a 'Search the catalog' link and 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 message about the April Users Group Meeting, which is also highlighted with a red box.

The second screenshot shows the 'Circulation' page. The 'Check in' button is highlighted with a red circle and the number 2. The 'Holds' section on the right contains buttons for 'Holds queue', 'Holds awaiting pickup', and 'Hold ratios'.

The third screenshot shows the 'Check in' page. The 'Check in' button is highlighted with a red circle and the number 3. The 'Options' section on the right contains 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.

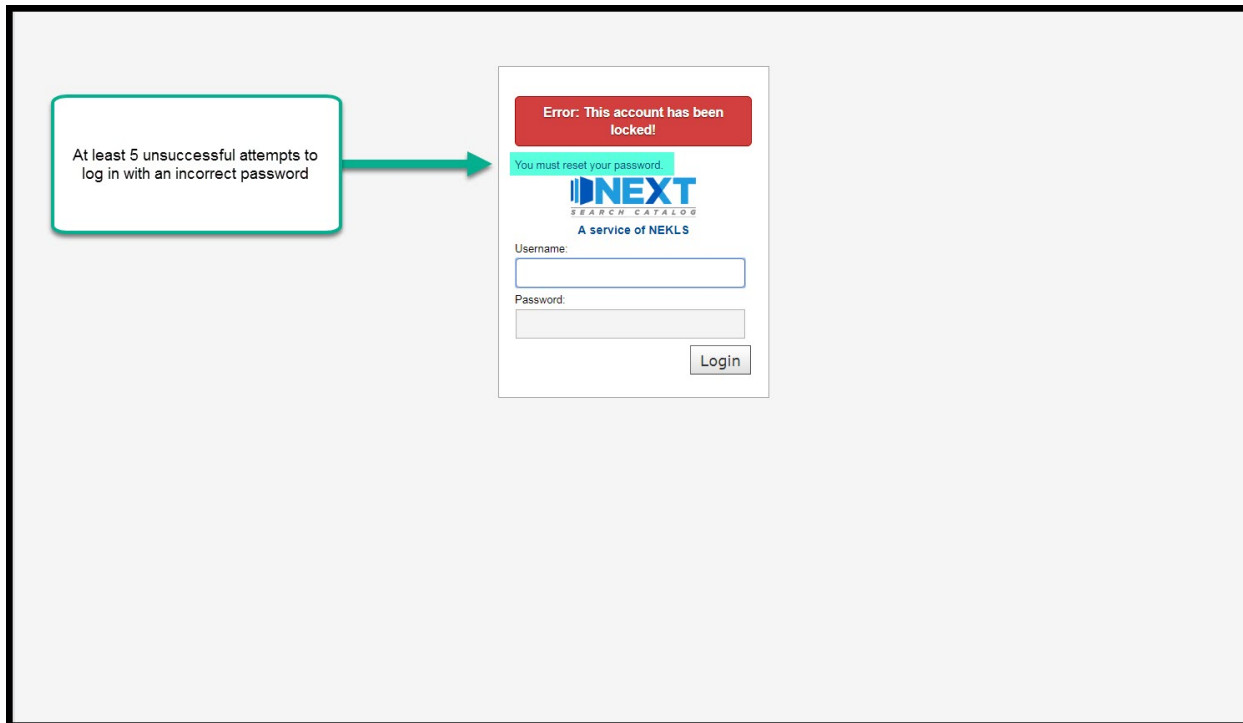
The first screenshot shows the 'Circulation' link in the top navigation bar, highlighted with a red circle and the number 1. Below the navigation bar, the 'Search the catalog' button is also highlighted with a red circle and the number 1.

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 a list of search results for 'The day of the jackal'.

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.

## 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

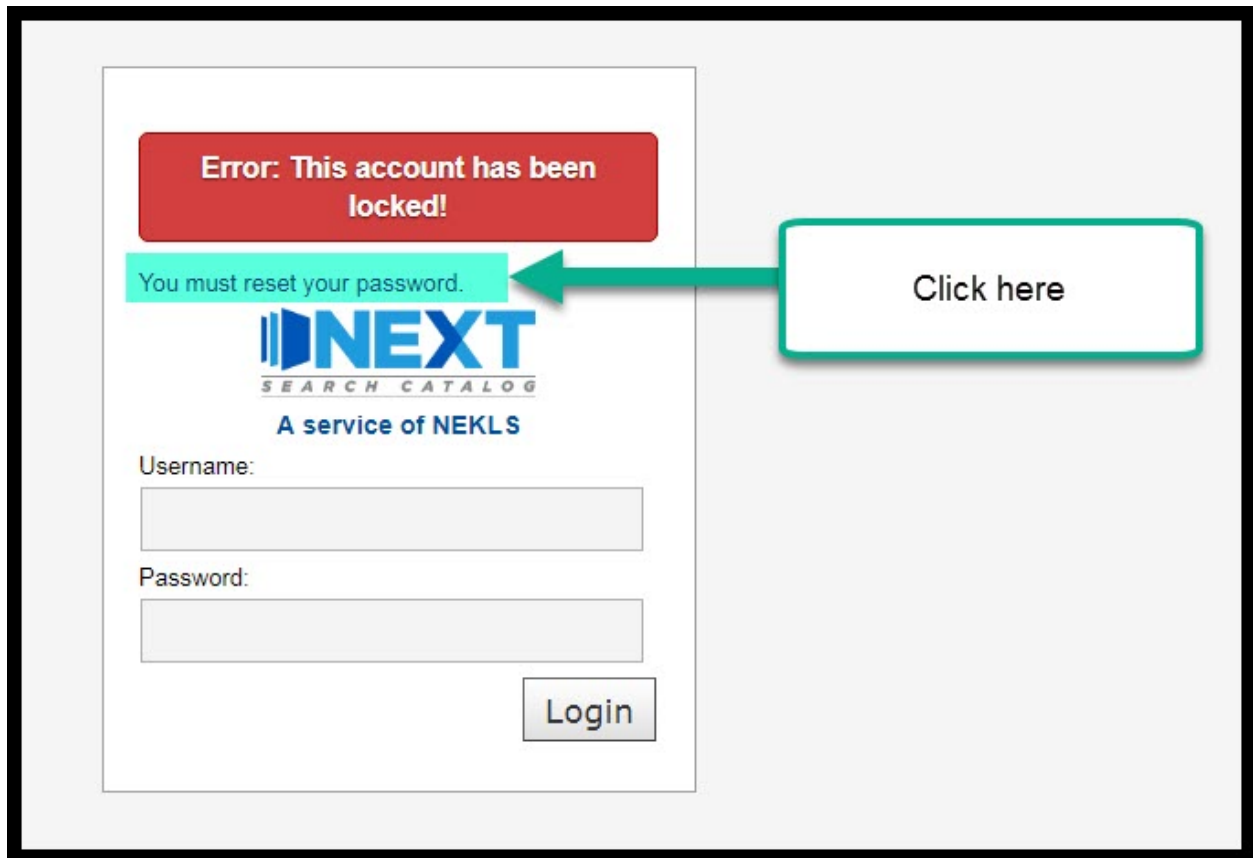
Because staff login accounts have a "SYSTEM LOGIN ONLY" account category, only system administrators can change the passwords on these accounts through the staff client. Since the only system administrators are at the NEKLS office, if you lock yourself out, NEKLS staff should be able to give you a new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

### 2.2.2 Unlock through the OPAC

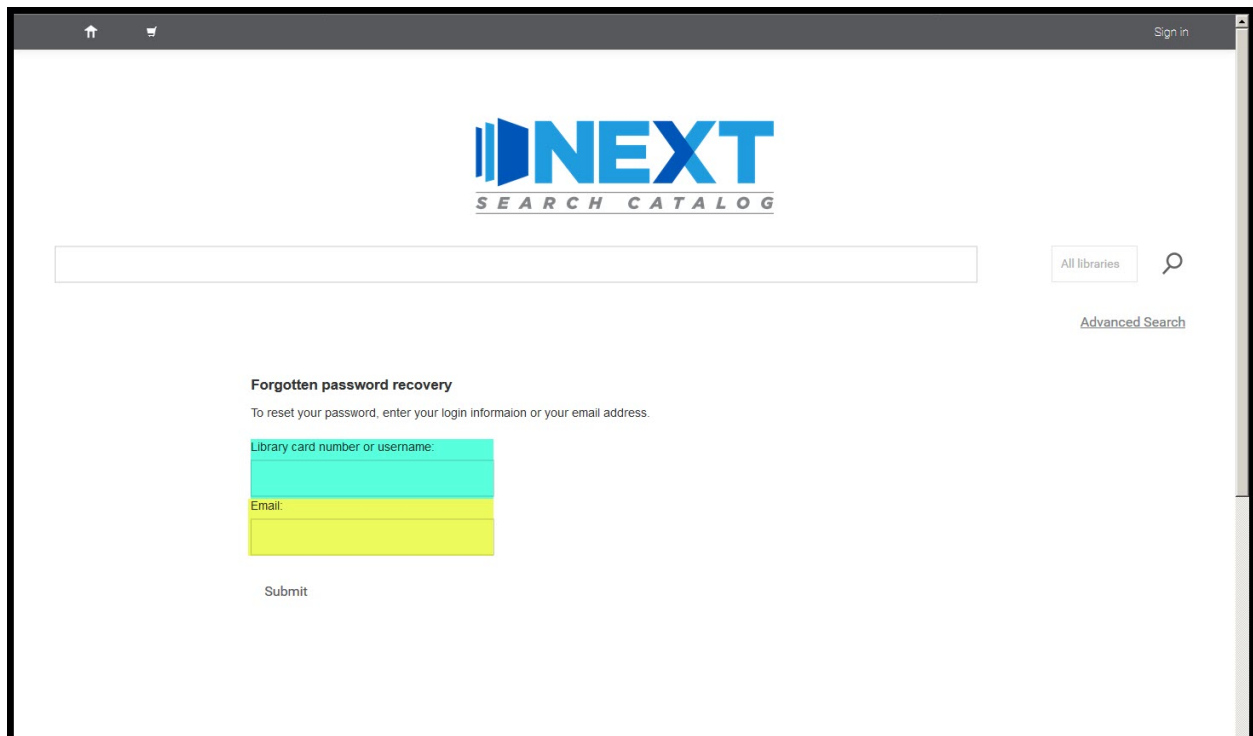
If you lock a staff account *and* there is an e-mail address on the account, you can unlock the account yourself by clicking on the "You must reset your password" text on the login page.

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.

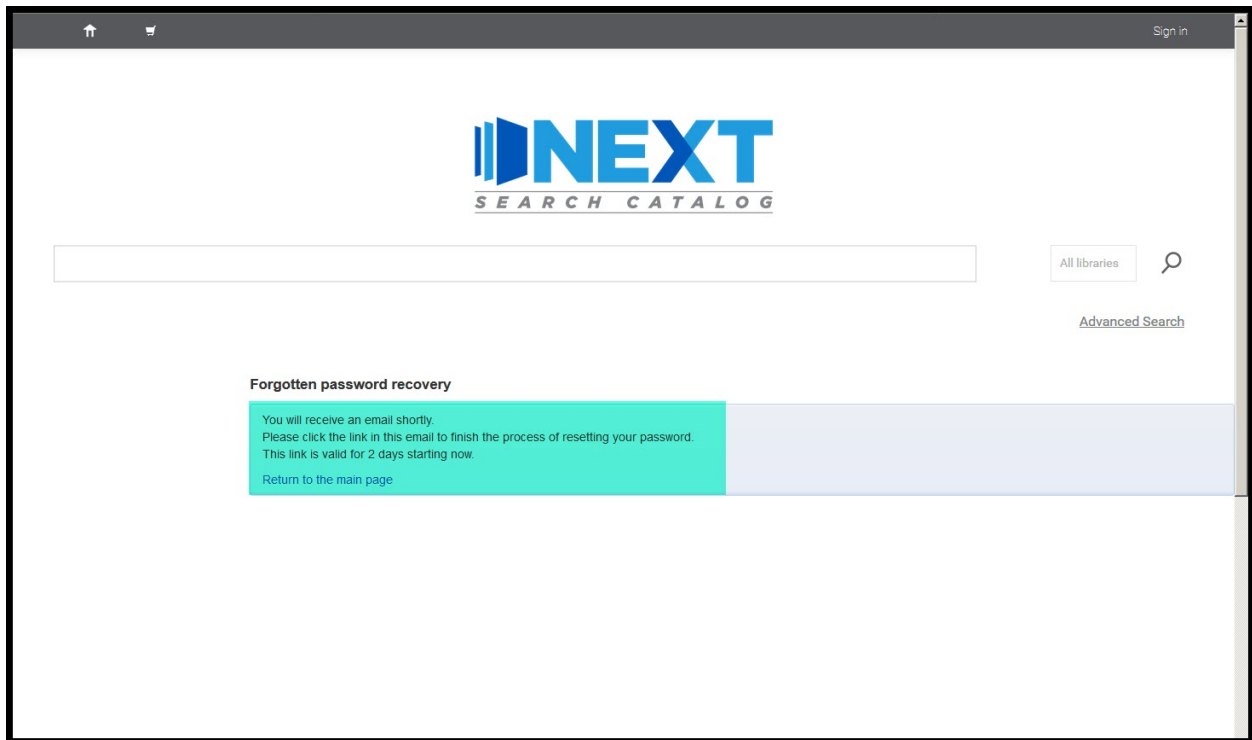
1. On the staff client login page, click on the "You must reset your password" link.



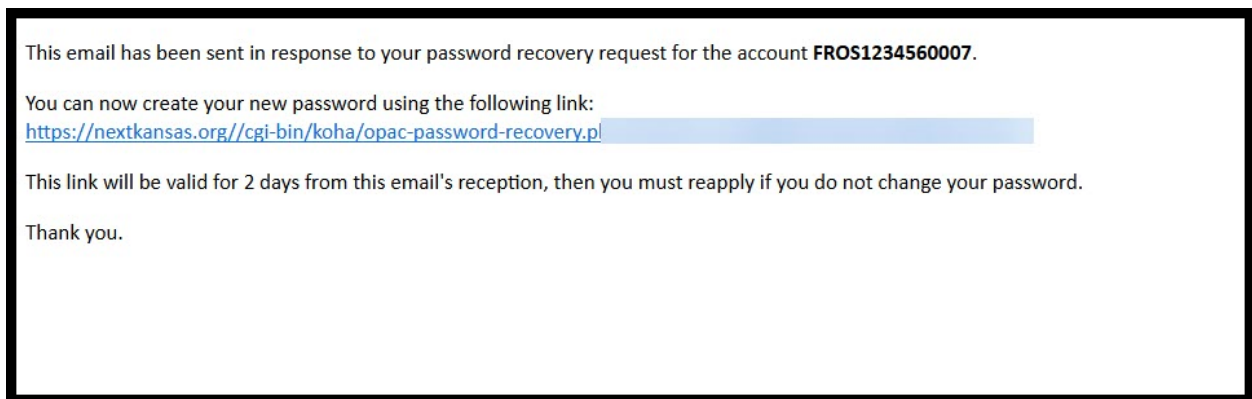
2. On the "Forgot your password?" page, you need to fill out the form with A) your staff username; and B) the e-mail address that goes with this account.



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:



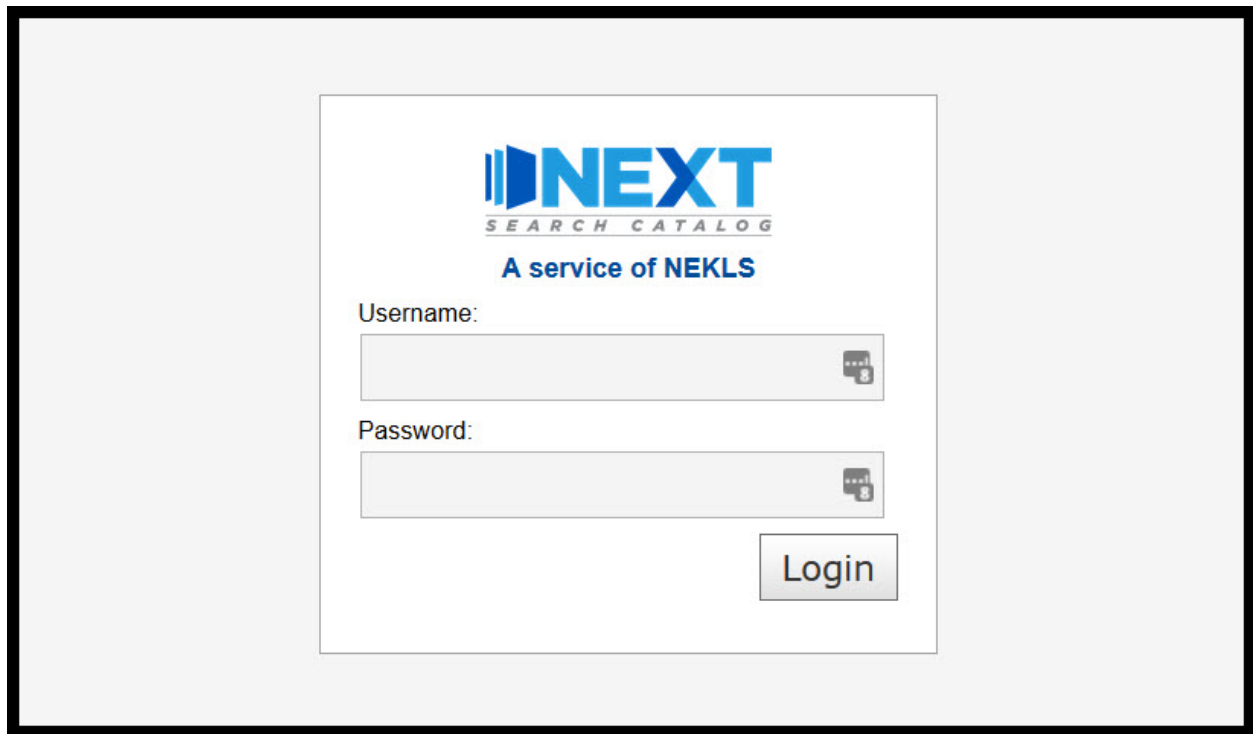
5. When you open the link included in the e-mail, you should be taken to a page that will allow you to create a new password:

The screenshot shows the 'Next Search Catalog' website. At the top, there is a navigation bar with a home icon, a shopping cart icon, and a 'Sign in' link. Below the navigation bar is the 'NEXT SEARCH CATALOG' logo. A search bar is located below the logo, with a dropdown menu showing 'All libraries' and a magnifying glass icon. To the right of the search bar is a link for 'Advanced Search'. The main content area is titled 'Forgotten password recovery'. It contains a message: 'The password must contain at least 4 characters.' Below this message are two input fields: 'New password:' and 'Confirm new password:'. Both fields are highlighted with a red border. A red arrow points from a text box on the right to the 'Submit' button. The text box contains the instruction: 'Fill out the form and click on "Submit"'. The 'Submit' button is located below the 'Confirm new password:' field.

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

The screenshot shows the 'Next Search Catalog' website. At the top, there is a navigation bar with a home icon, a shopping cart icon, and a 'Sign in' link. Below the navigation bar is the 'NEXT SEARCH CATALOG' logo. A search bar is located below the logo, with a dropdown menu showing 'All libraries' and a magnifying glass icon. To the right of the search bar is a link for 'Advanced Search'. The main content area is titled 'Forgotten password recovery'. It contains a message: 'The password has been changed for user "FROS1234560007".' Below this message is a link: 'Click here to login.' The message and link are highlighted with a green border.

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 requests pick-list 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.

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

### 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. 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. 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. It is also possible for the last item attached to a bibliographic record to be deleted automatically if the item is overdue for more than 45 days. 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.

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
- search
- search