Next Search Catalog Staff Training Documentation
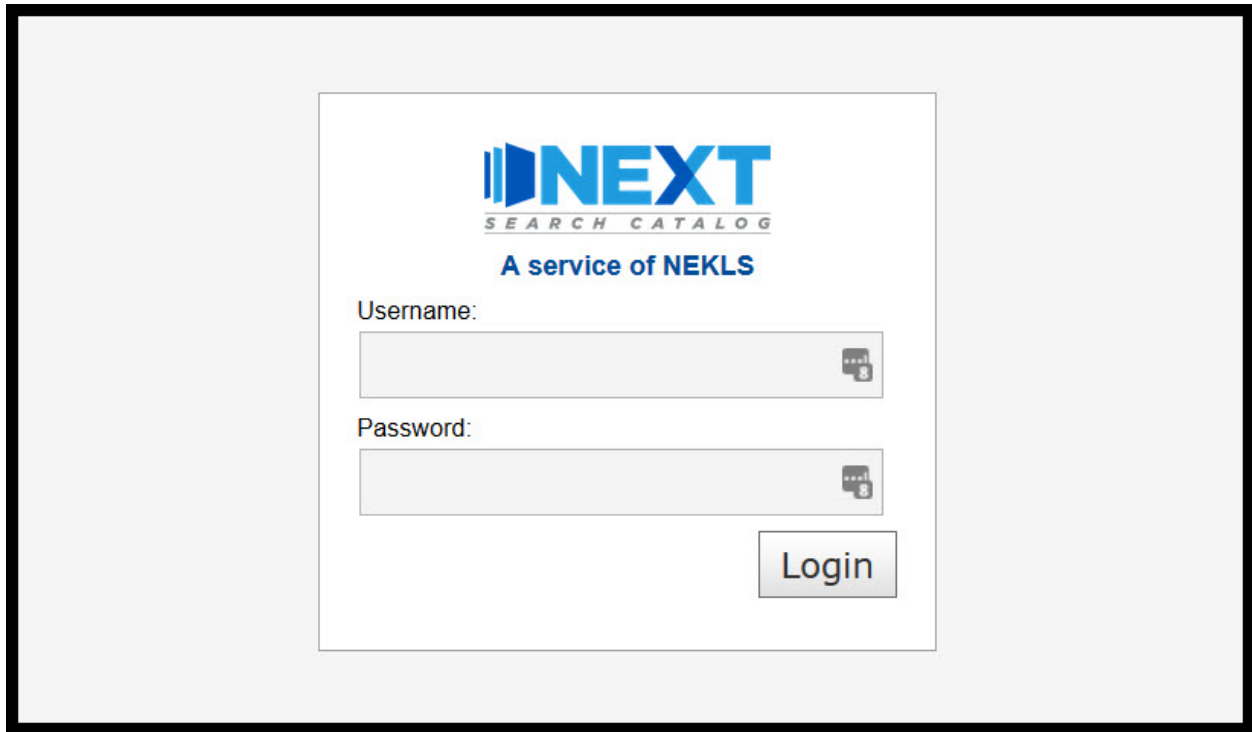
NEKLS Staff

Apr 09, 2019

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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:

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
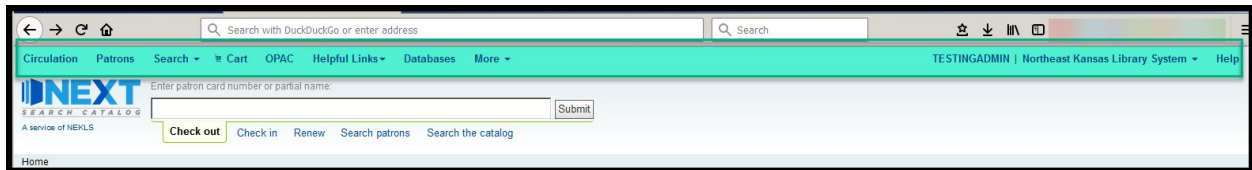
1.4 Useful things to know

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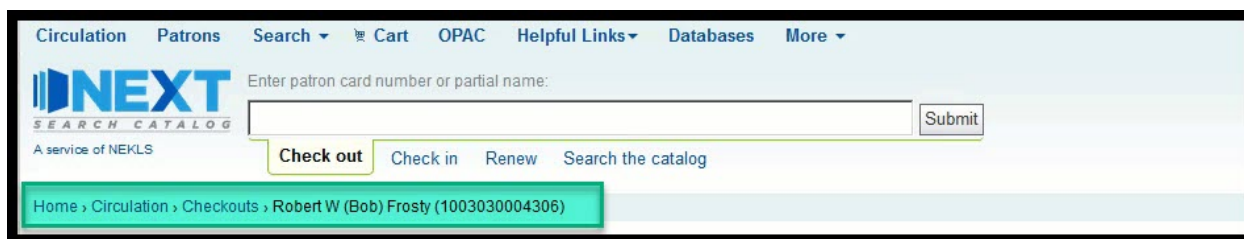
Each level to the left of a '>' symbol is one level up in the system's hierarchy.

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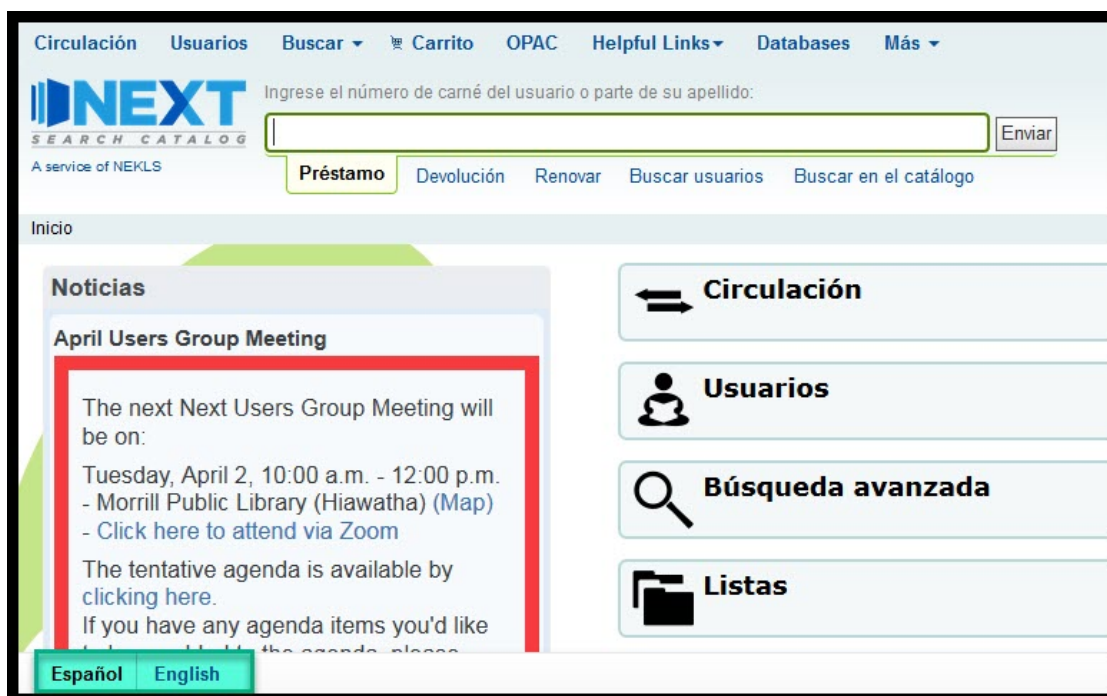
These controls only affect the language of the built-in controls in the system. It will not change the language of any data we've added to the system such as patron names or bibliographic record information.

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

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.

- 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"

1.5.4 Checking in an item on hold

If you check in an item that has 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. Transfering an item with a request for pickup at a different library

2. Transfering 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.

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.

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.

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.
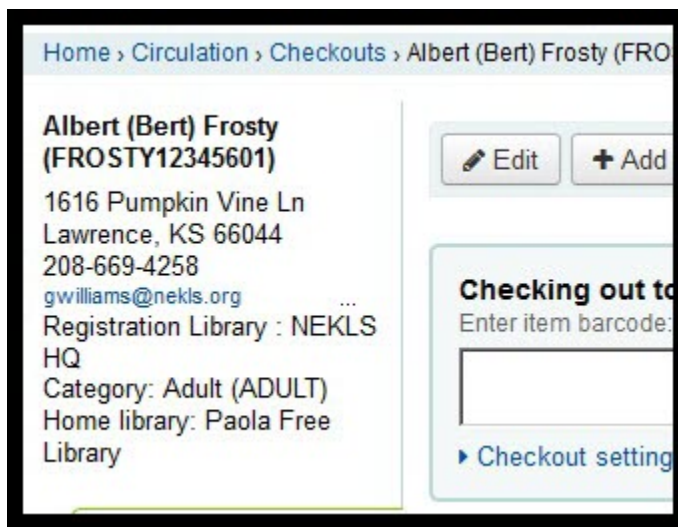
1.6 Checking items out
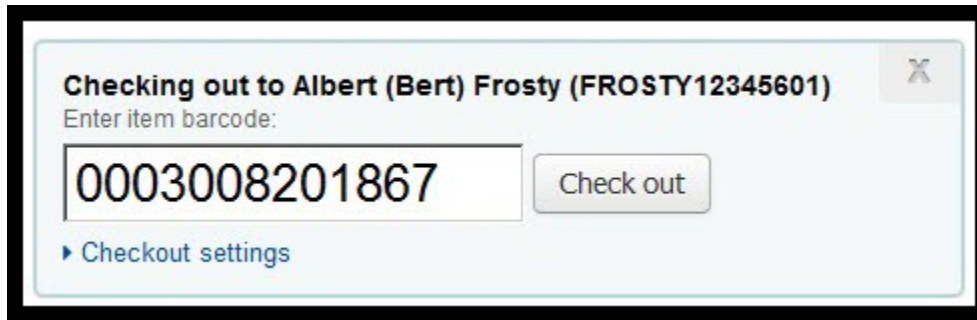
Access the patron's account

Make sure you've got the correct account

Scan the item barcode in the "Enter item barcode" field

The "Checkouts table will update with information about the item you just checked out"
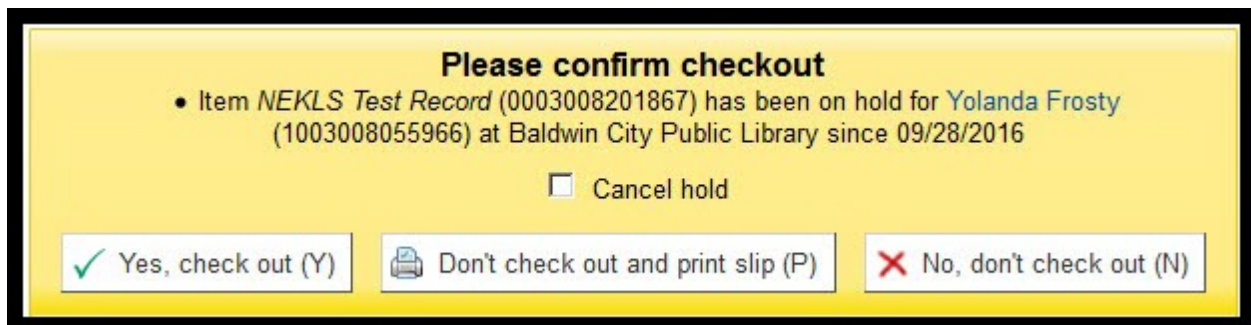
Follow your library's procedures for errors if any error messages pop up
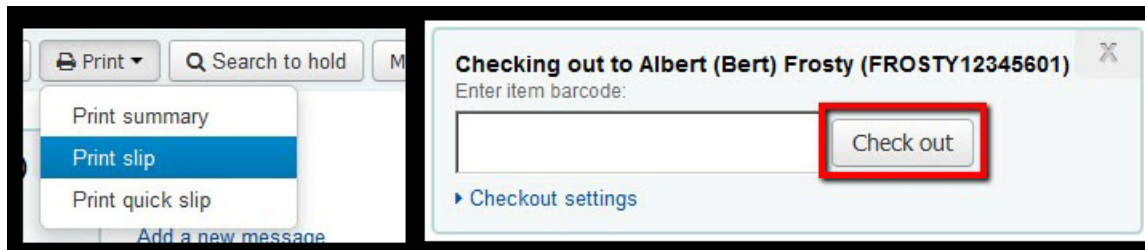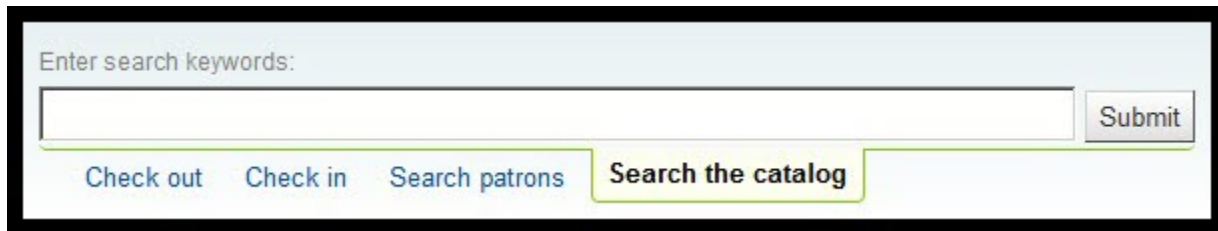
Print a receipt if needed once all items have been checked out
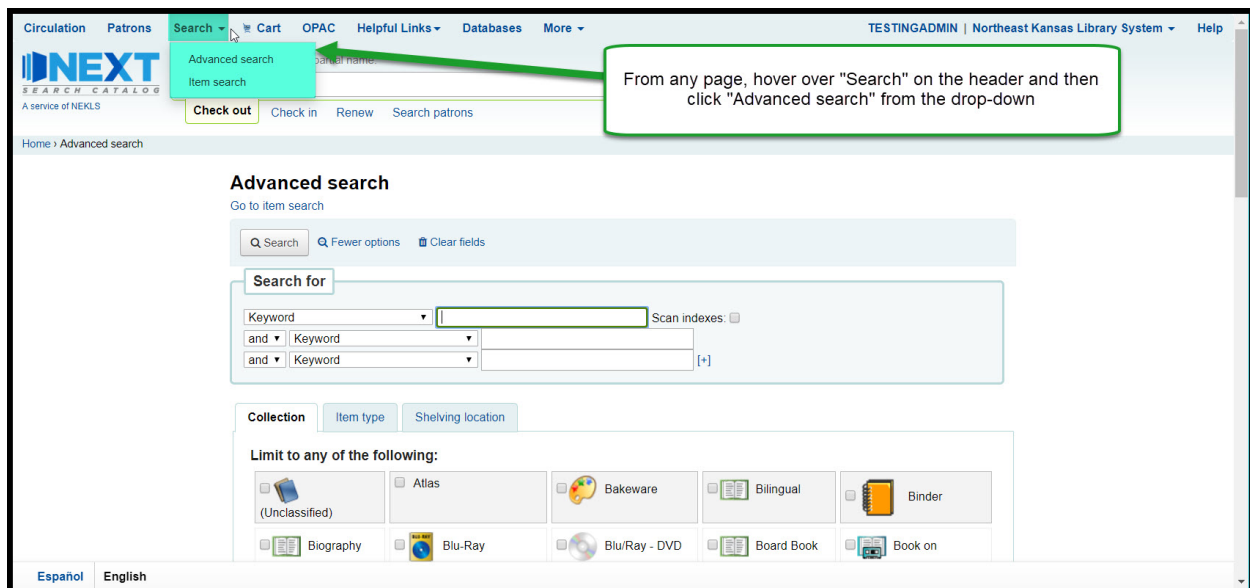
1.7 Searching the catalog

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.

The "Advanced search" page allows multiple search types
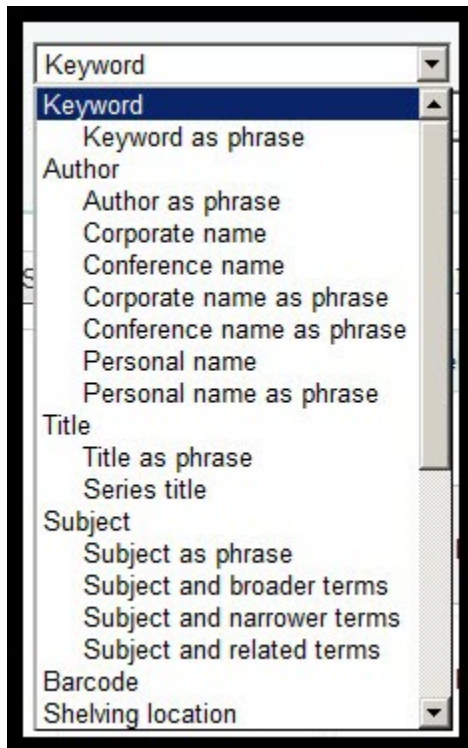
An advanced search can be limited by Collection code, Item type, and Shelving location
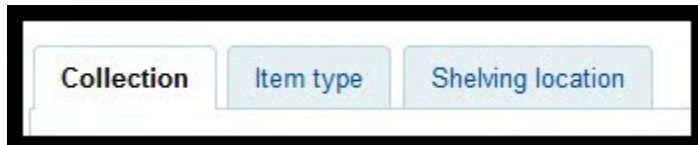
An advanced search can also be limited by year and language (provided that the language information is included in the bibliographic record)

Searches can also be limited by library and availability

TWO
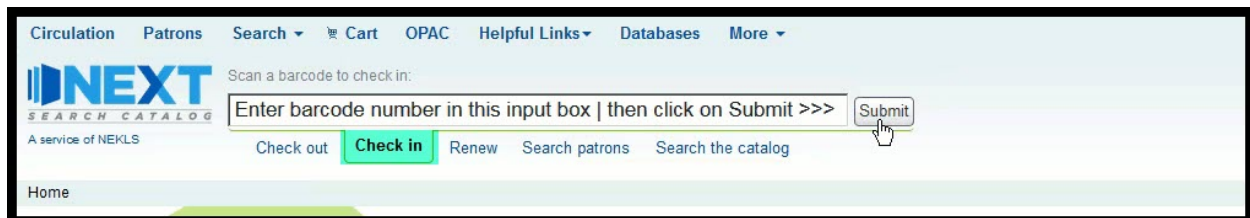
NOTES/APPENDIX FOR BASIC STAFF TRAINING

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.

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.

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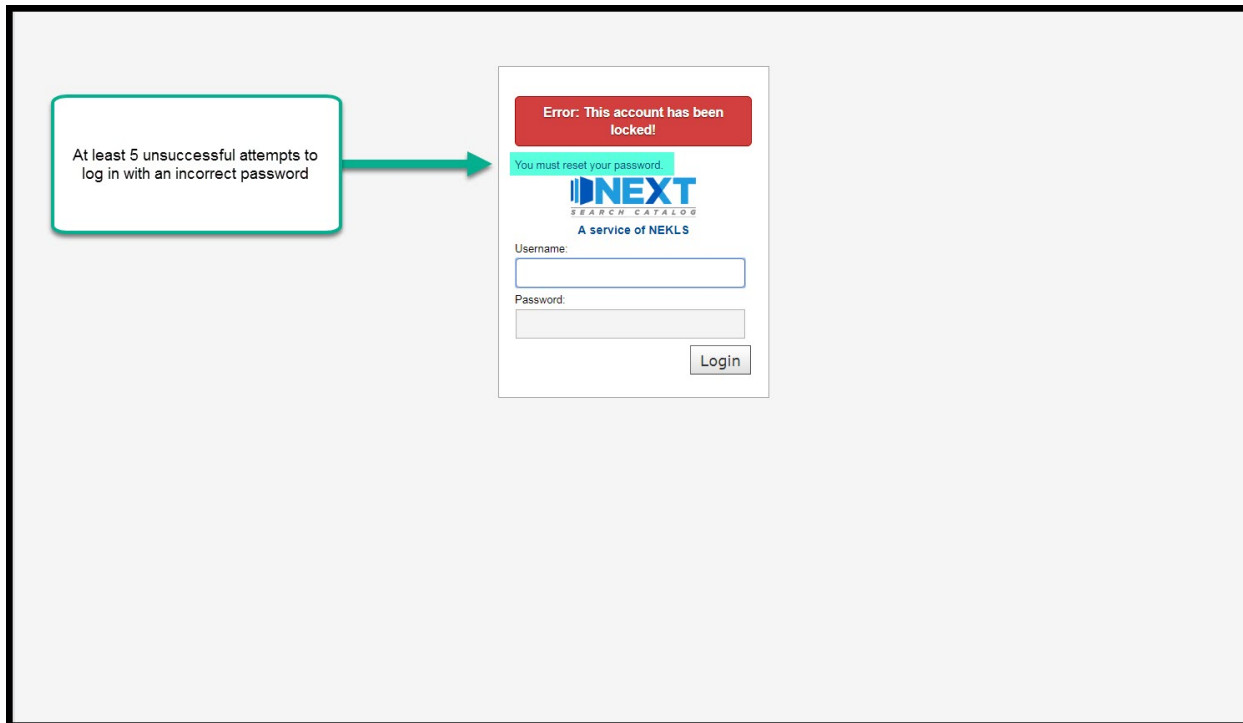
If this happens, you have two (2) options for unlocking the account:

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.
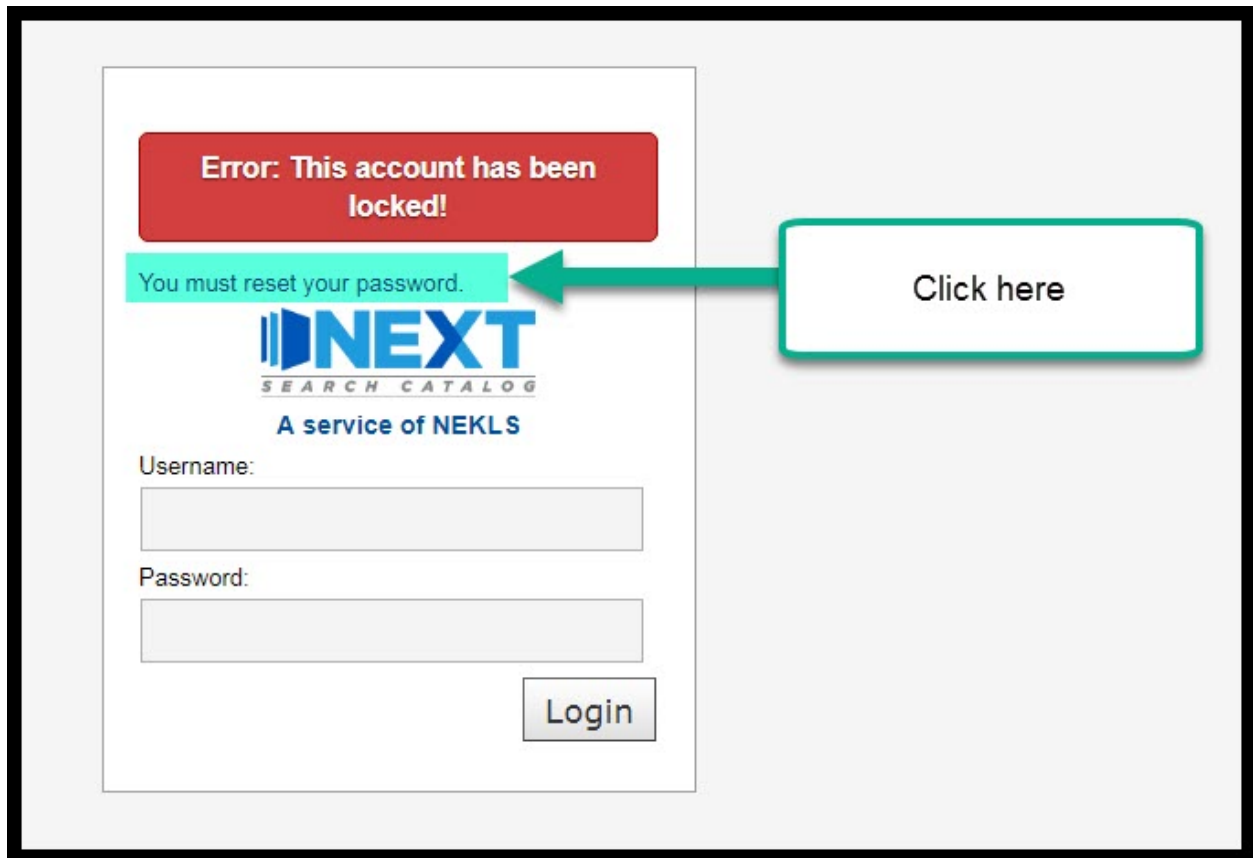
2. On the "Forgot your password?" page, you need to fill out the form with A) your staff username; and B) the e-mail address that goes with this account.
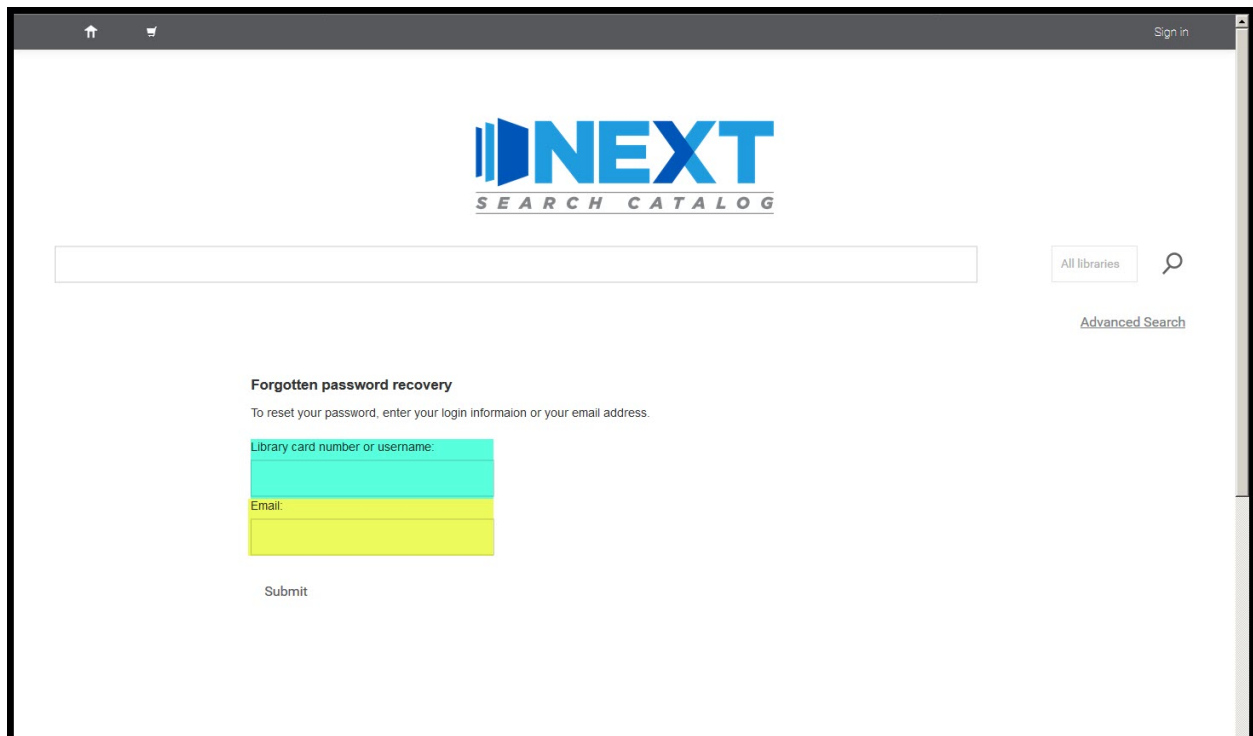
3. If the login information and the e-mail address match this message should appear:
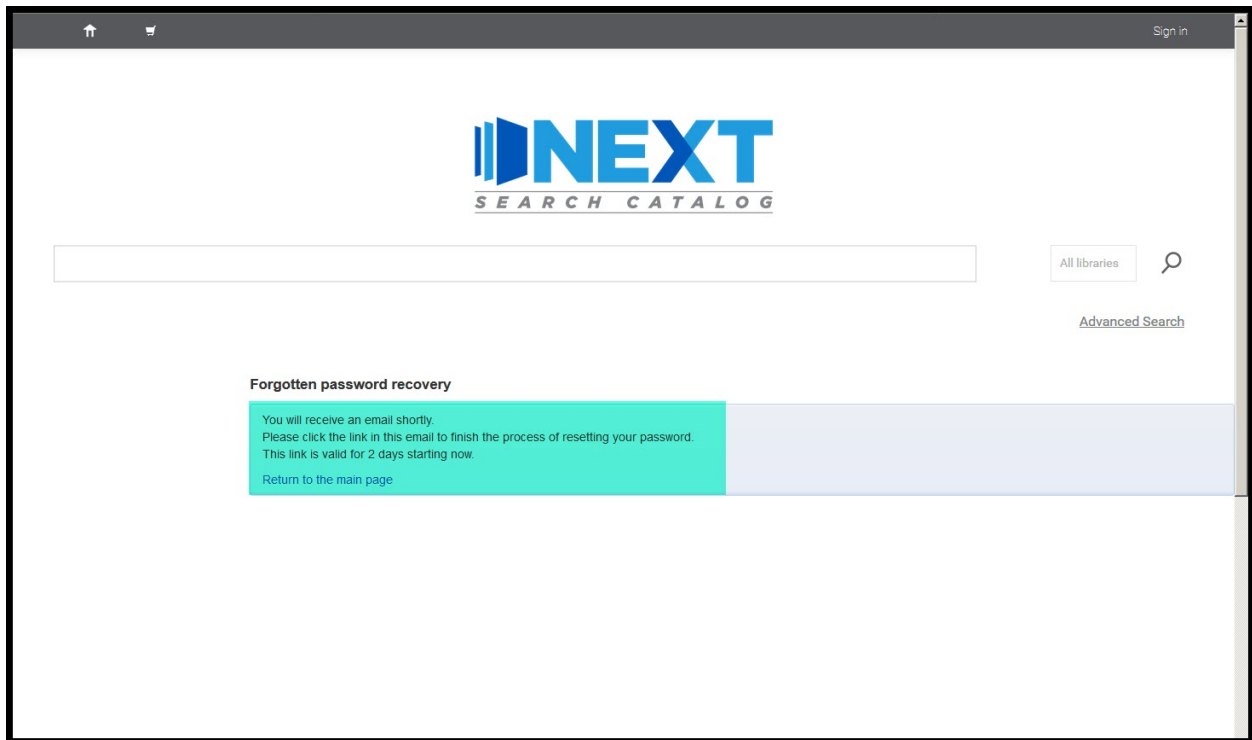
4. If successful, you should receive an e-mail address like this one within 15 minutes:

This email has been sent in response to your password recovery request for the account **FROS1234560007**.

You can now create your new password using the following link:
https://nextkansas.org//cgi-bin/koha/opac-password-recovery.pl

This link will be valid for 2 days from this email's reception, then you must reapply if you do not change your password.

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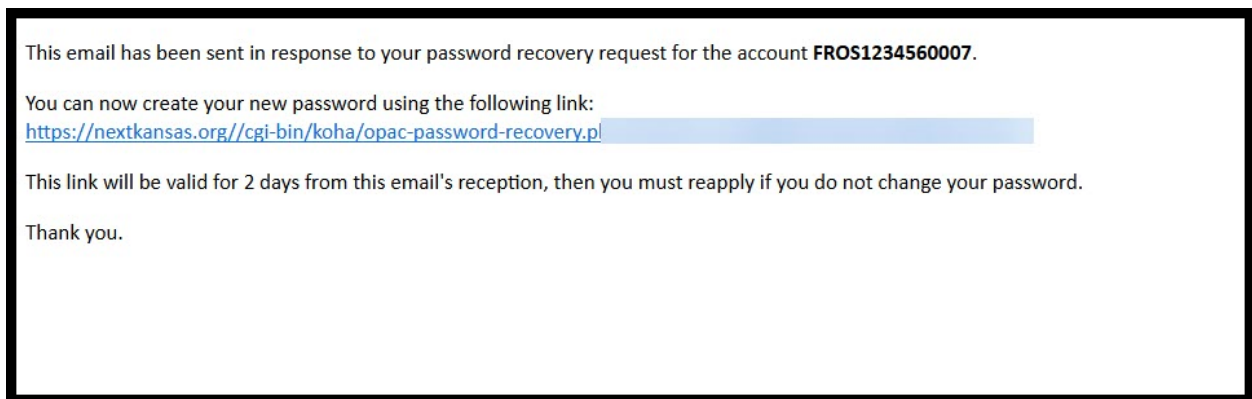
5. When you open the link included in the e-mail, you should be taken to a page that will allow you to create a new password:

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.
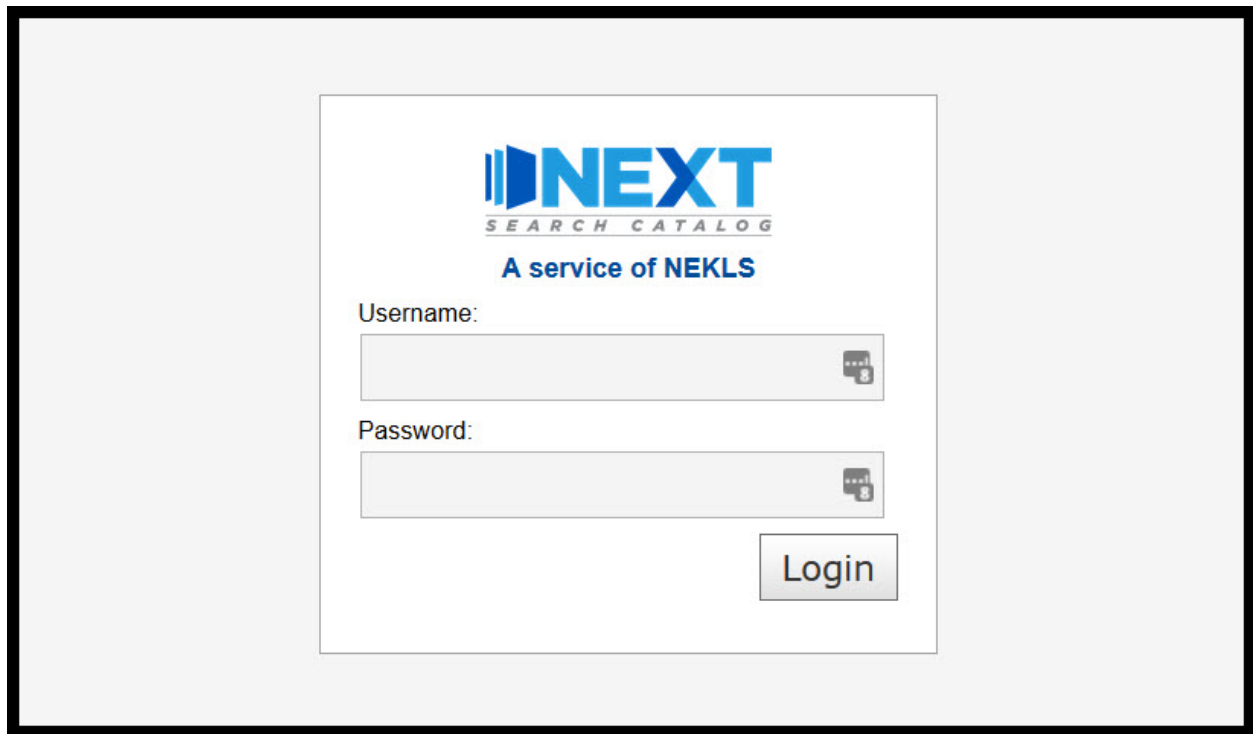
2.3 Timeline for deleted items

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 "deleteditms" 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 bibliogrpahic 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:

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

```
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