Aleph Offline Circulation

Overview

This document describes how to use Aleph's Offline Circulation function.

Libraries should **not** use Offline Circulation as a matter of convenience when the online circulation system is available. Usage is expected to be rare, mainly during planned system maintenance and upgrades. Please be aware of the following:

1. Offline Circulation **cannot** check any criteria when loaning materials, including:
   - Patron status
   - Patron expiration date
   - Patron block
   - Item status
   - Item hold requests

2. It is not recommended to use Offline Circulation to return materials. There are no checks for hold requests on returned items, and libraries agree that returning items is not as critical during system downtime. Wait for the system to come back up in order to return items.

How to Use Offline Circulation

Aleph Offline Circulation operates by writing transactions to a data file on the workstation's C drive called offcirc.dat. When Aleph is back online, this file is then imported into the live system, and the transactions are recorded on the server. The file is saved in this folder:

C:\AL50022\Circ\files\HVD50\offcirc.dat

Because each workstation has its own offcirc.dat file, the following steps must be performed on **each workstation** conducting Offline Circulation.

I. Initial setup for Offline Circulation

During a given Aleph outage, you must first assure that each workstation's offcirc.dat file is clear of any stale transactions that may have been entered into Offline Circulation since its last use.

1. Open Aleph Circulation
2. Do not type in a User Name or Password – click Cancel
3. At prompt to Start the Application anyway, click Yes.
4. Click OK on the Remote Service Error message
5. Click Circulation in the top menu
6. Select Offline Circulation
7. If you see this message upon opening Offline Circulation **for the first time** during a given Aleph outage, click **Yes**:
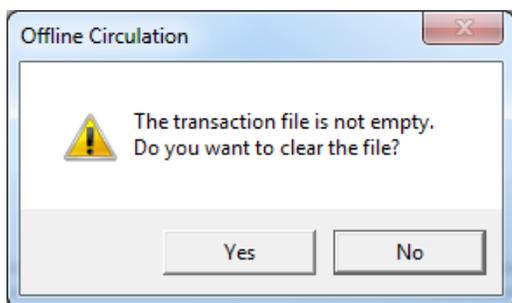
This will assure that any stale data in the workstation's transaction file is cleared.

Important: **if, during the same Aleph outage, you close and re-open the Offline Circulation menu box on any workstation, click NO whenever you see the prompt in Step 8 above**. This will ensure that you do not erase any transactions that need to be uploaded when Aleph is again available.

II. Loaning items using Offline Circulation

Once you have performed the initial setup, follow the instructions below to perform loan transactions in Offline Circulation.

1. Open Offline Circulation following the instructions in Part I above.
2. Scan in Patron ID
3. Scan in Item Barcode
4. Make sure the Loan radio button is selected in the "Choose Transaction" box (loan is the default)
5. Click Loan
6. Continue to Loan items until finished with this patron
7. Delete Patron ID from Patron ID/Barcode box before continuing with next patron
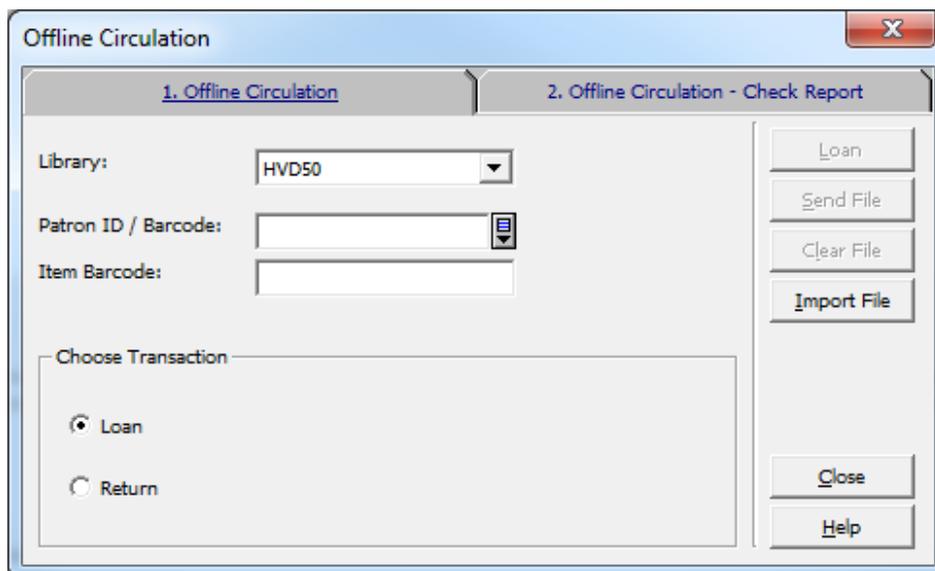

Notes:

- Offline Circulation will accept all IDs and barcodes regardless of their validity or home library. Always use a barcode scanner to avoid typos.

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- Patron IDs remain in the window until you scan a new ID or clear it from the screen manually. When you have performed all loans for a given patron, it is important to clear his/her ID, so that the next patron's items are charged to the correct person.

III. Returning items using Offline Circulation

Once you have performed the initial setup, follow the instructions below to perform loan transactions in Offline Circulation.

1. Open Offline Circulation following the instructions in Part I above.

2. Make sure the Return radio button is selected in the "Choose Transaction" box (loan is the default)

3. Scan in Item Barcode

4. Click Return

5. Continue to Return items until finished
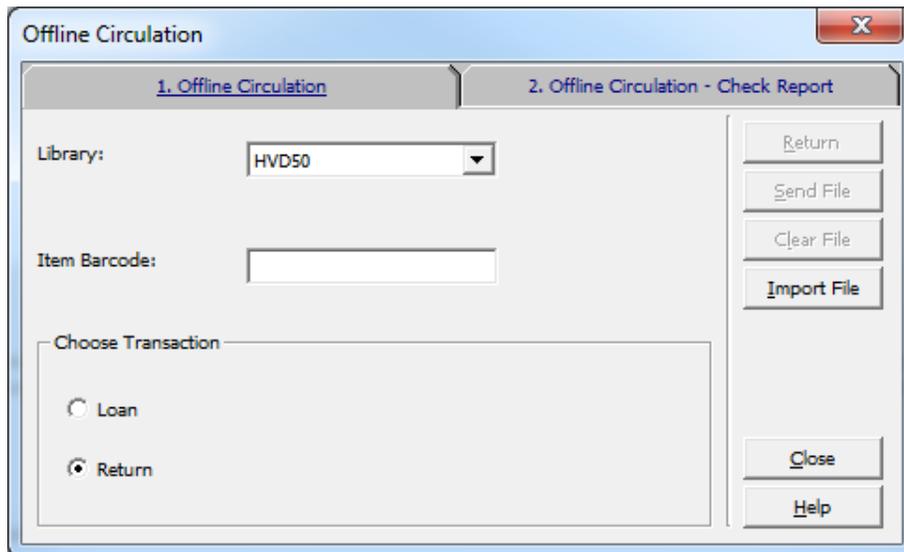
**IV. Retrieving the Offline Circulation Data File**

When you have completed use of Offline Circulation and online Aleph is again available, each workstation's offcirc.dat file must be imported into the regular circulation system.

1. Login to "online" Aleph
2. Click on Circulation in the top menu
3. Select Offline Circulation
4. If you see the message below, click **No**:
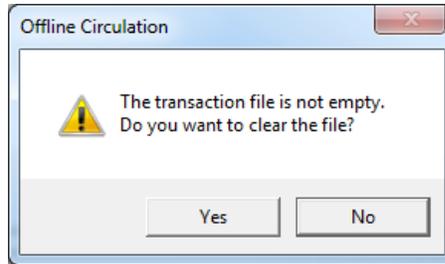
5. **Click Send File to upload offline circulation data.** If the Send File button is grayed out, click Import File to navigate to the workstation's Offline Circulation data file. *The Send button should only be grayed out during Aleph version upgrades. For example, when opening Aleph Version 22 for the first time, you will need to look in the Version 20 folder for the data file.*

   Import this file: C:\AL50022\Circ\files\HVD50\offcirc.dat
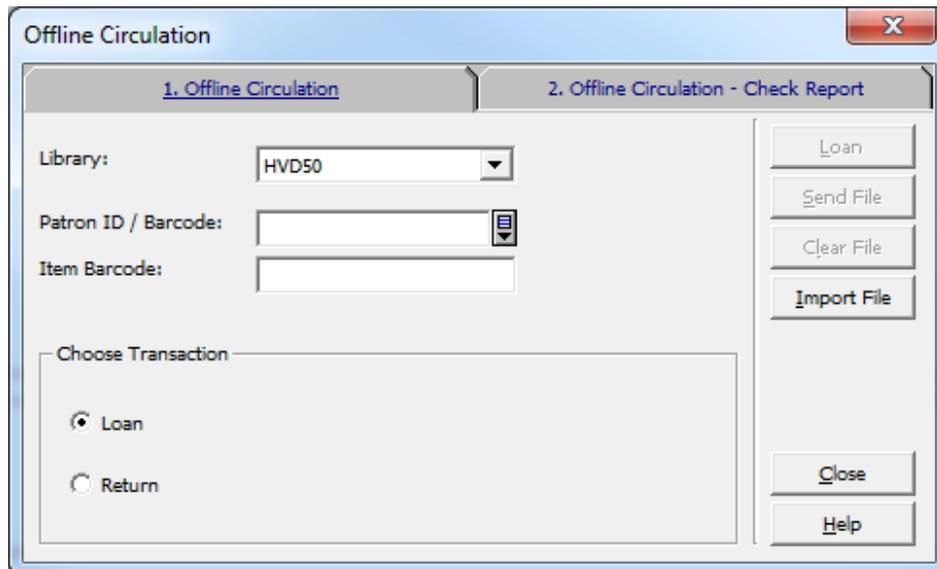
6. Click the Send File button. There is no success message, but this action will import the workstation's offcirc.dat file into the Aleph system. **End of process.**

Other Behavior of Offline Circulation

Charging a book with hold request for another patron (not yet on "hold shelf" status):

Following same procedure as above, the item will charge to the patron ID entered into the offline circulation system. However, it places an immediate recall on the item for the requesting patron who has now been bumped in line.

As you can see it charged the book for 10 days and gave the item an effective due date.

Other behaviors:
- Charging a book that is charged to any of the IN TRANSIT pseudo-patrons results in the correct due date being charged.
- Charging a book that is already charged to another patron, charges book normally to the ID entered into the offline system.

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You do not receive an error message pop-up for any of the scenarios above when sending the offline data file.

- Charging a book that is "On Hold" (on the hold shelf – unlike first example which is for an item that was never discharged to the hold shelf) for a patron, charges normally to the patron that receives the book. The book also looks like it is still "On Hold" for the original patron. The hold will disappear in 10 days.

- Charging a book with an expired ID: results in the item being due immediately upon upload of the offline circulation file. There will be no indication that the ID is expired at the time of charge.

- Charging a book with a non-existent or invalid barcode results in no charge on the patron's record

Charging a Non-Circulating Book:
Same process as above.
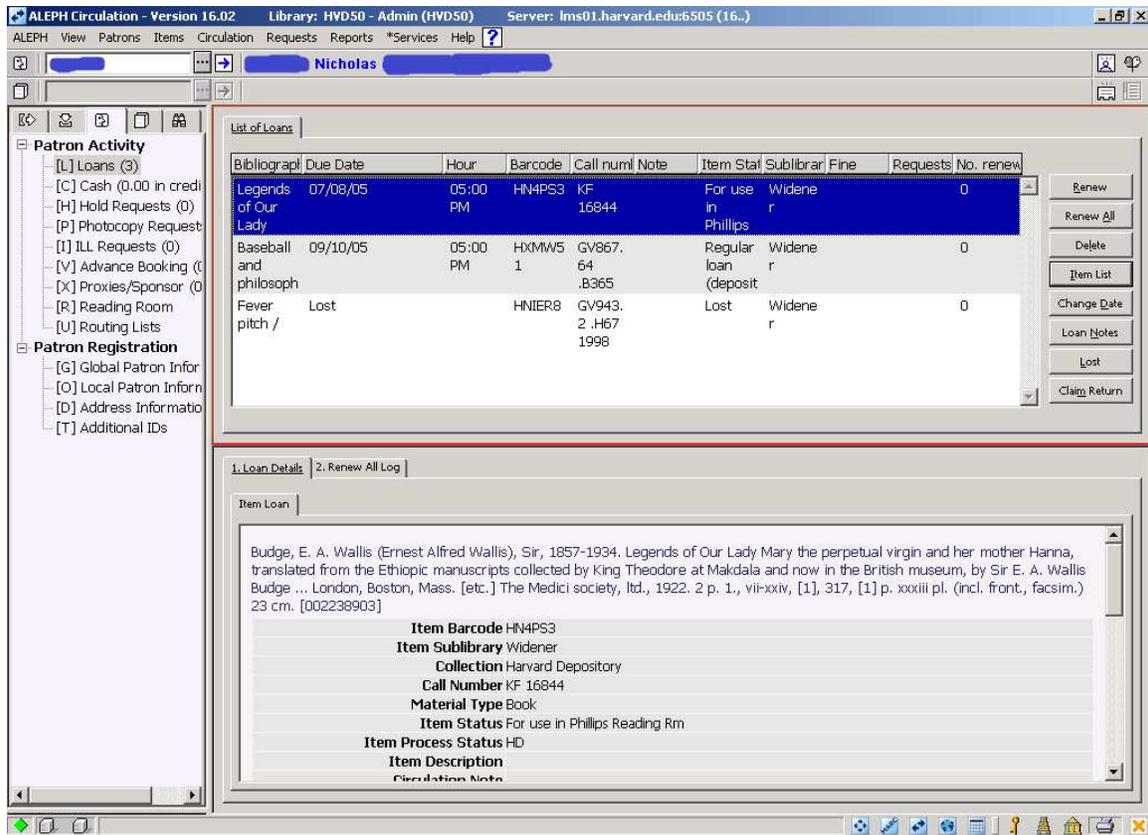
This results in the item being due immediately upon upload of the offline circulation file. There will be no indication that the item is non-circulating at the time of charge.

Charging a book that belongs to another library:
The book **will** be charged with the corresponding loan rules of the owning library.

Charging a book that belongs to another library and that is charged out to another patron:
The book will be charged to the patron ID entered into the offline system with the corresponding loan rules of the owning library.

Charging a book that belongs to another library and that has a hold for another patron:
The book is charged to the patron ID entered into the offline system with a normal loan period corresponding with the loan rules of the owning library.