Atriuum®

Offline Circulation Tool

Booktracks®

BookSystems®

Introduction

The Book Systems **Offline Circulation Tool** keeps library items circulating (Atriuum) or allows you to continue distributing/collecting textbooks and equipment (Booktracks) even if your network goes down. This intuitive application is easy to install, configure, and use.

Your training session went over the importance of downloading this tool as soon as possible so it is available whenever you need it; then, when your network connection is restored, you can upload all offline circulation transactions with a single click!

This document covers installing and setting up the tool as well as using it for check out and check in transactions. If you already installed the tool, make sure you have **Version 1.2** by clicking **Help**, and then **About** from the top menu. If you need a newer version, follow the installation steps below.

These instructions are for Microsoft® Windows® customers, specifically those using Windows 10.

Setup

To ensure that the **Offline Circulation Tool** is available whenever the need arises, install and configure the tool ahead of time. This section covers both of these important tasks to get you started.

Install the tool on only *one* machine in your library or school to prevent synchronization problems.

Installation

1. Click **Administration** from the **Menu Bar**, and then click **Library** (Atriuum) or **General** (Booktracks).

    All product links mentioned in this document are **dark blue bold**; however, the color you see will vary depending on which product you are using and, for Atriuum customers, what **Librarian Desktop™** theme you have selected.

2. Click **Downloads** to open the list of tools and documents available.

    You can also click the **Downloads** button from the **Toolbar**.

3. Find the **Utility Name** section, and click **WindowsOfflineCirculationSetup.exe** in the **File Link** column. Contact your network administrator if you have issues with your download.

    If you are a macOS® user, click **macOSOfflineCirculationSetup.pkg** to download a version of the tool specific to your machine.

4. Follow the options onscreen to run the executable or save it to your machine. If you save it, when you are ready to install, find your local folder, and double-click the executable. Depending on your security settings, you may be prompted to confirm that you want to run the executable.
5. When you run the installer, the **Setup - Book Systems Offline Circulation v1.2** wizard opens.
6. Specify the destination location for the tool. You can choose to accept the default provided; otherwise, click **Browse…** to open the **Browse For Folder** dialog box, select a folder, and then click **OK**.

⚠️ This tool requires at least 27.2 MB of free disk space to run on your machine.

7. Click **Next >**.
8. Specify the location for the program's shortcut in the **Start Menu**. You can choose to accept the default provided; otherwise, click **Browse…** to open the **Browse For Folder** dialog box, select a folder, and then click **OK**. If you do not need to access the program from the **Start Menu**, click the **Don't create a Start Menu folder** check box.
9. Click **Next >**.
10. We recommend clicking the **Create a desktop shortcut** check box so your tool is easily accessible.
11. Click **Next >**.
12. The installer will display the locations and tasks you specified. Click **Install** to load the program; otherwise, click **< Back** to make any needed changes, or click **Cancel** to end the installation.
13. An **Installing** progress bar displays while the wizard extracts the files to your computer. When the process is finished, the dialog box refreshes.
14. By default, the **Launch Book Systems Offline Circulation** check box is enabled so the tool opens after you click **Finish**.
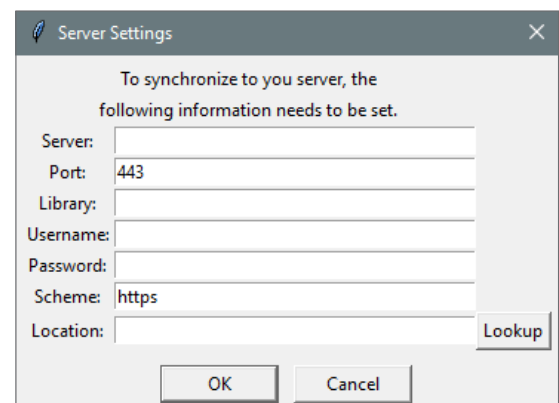
🐧 New customers will need to enter your library's connection information into the **Server Settings** dialog (see steps below). If you are upgrading to a newer version, your server settings are retained from your previous version.

Configuration

After installation, you need to configure your **Offline Circulation Tool**, ensuring that it will communicate with the Atriuum or Booktracks *Server* and send circulation transactions back to the applicable product.

1. Click **File** to open the drop-down menu.
2. Click **Server Settings** to open the **Server Settings** dialog box.

3. Enter the appropriate information in each of these fields. For the **Server:** and **Library:** fields, refer to your Atriuum/Booktracks URL in the address bar. The examples in this section are for a sample library, but the same fields apply to schools using Booktracks.
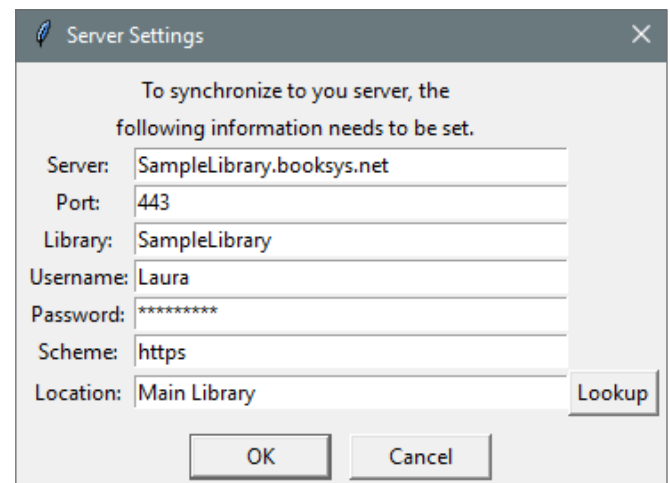
- In the **Server:** field, enter the first part of the address between the double slashes and the first single slash.

> https://SampleLibrary.booksys.net/libs/SampleLibrary/LibrarianLogOn

- In the **Port:** field, leave the default **"443"** for secure sites (https) or enter **80** for other sites (http). Contact your systems administrator if these numbers do not work.
- In the **Library:** field, enter the part of the address between **/libs/** and **/LibrarianLogOn**.

> https://SampleLibrary.booksys.net/libs/SampleLibrary/LibrarianLogOn

- In the **Username:** and **Password:** fields, enter the same username and password you use to log on to Atriuum or Booktracks.
- In the **Scheme:** field, leave the default **"https"** to indicate a secure connection or change to **http** as needed.
- Next to the **Location:** field, click **Lookup** to open the **Locations** dialog box. If your product is part of a **Distributed** database, you must select the *Main Library* option from the drop-down list. **Centralized** users will need to click the drop-down button to open a list of the branches in the database, and click again to make a selection. After choosing your location, click **OK**.
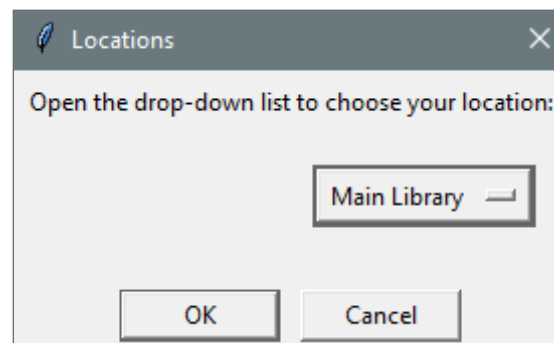
Server Settings

To synchronize to you server, the following information needs to be set.

Server:	SampleLibrary.booksys.net
Port:	443
Library:	SampleLibrary
Username:	Laura
Password:	********
Scheme:	https
Location:	Main Library [Lookup]

[OK] [Cancel]

Locations

Open the drop-down list to choose your location:

Main Library

[OK] [Cancel]

4. When you are finished entering your server settings, click **OK** to save your changes.

> ⚠️ You must have the **Upload Data And Sync From Supplemental Tools** permission enabled on the **Add/Edit Worker** form in Atriuum/Booktracks to successfully connect to the server and sync files; otherwise, you will see an error before you can continue.
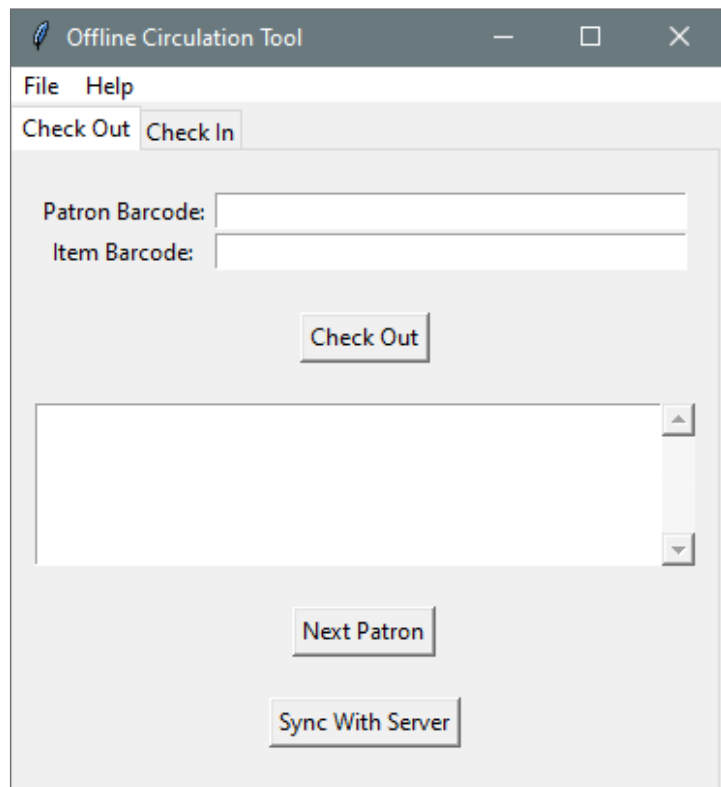
Circulation

If your **Offline Circulation Tool** is installed and configured correctly, you can open it and circulate items as needed.

Keep in mind that this tool captures and displays basic circulation information (patron/student barcodes and item barcodes). Fines will be assessed as usual based on due dates when data is synced to your database.

Check Out

Use the following steps to process any library items patrons want to check out or textbooks/equipment students or teachers need.
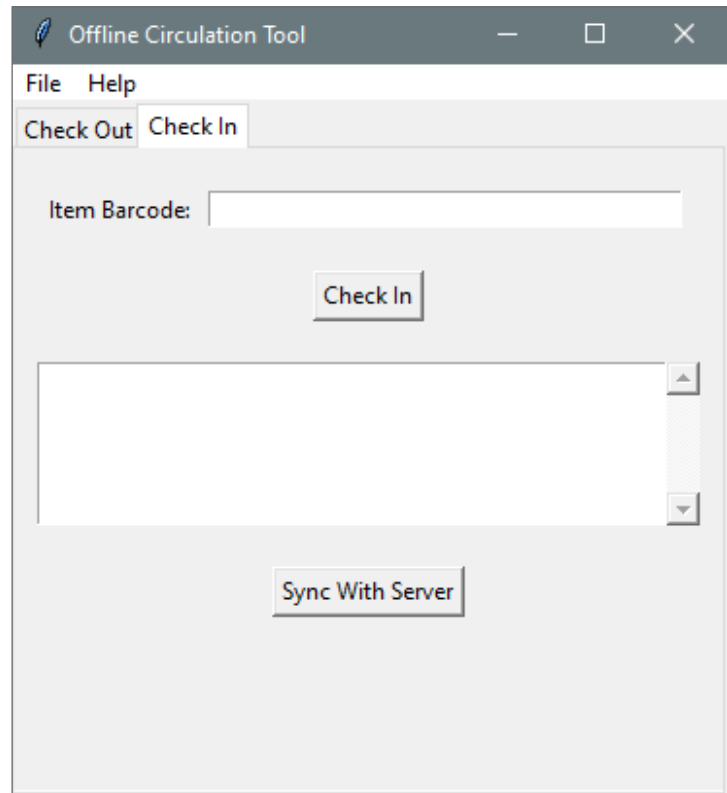
1. Click the **Check Out** tab.
2. Scan or enter the patron's barcode in the **Patron Barcode:** field.
3. Scan or enter the item's barcode in the **Item Barcode:** field.
4. Click **Check Out** to move the barcodes into the queue below. The patron barcode remains in the **Patron Barcode:** field.
5. If the patron is checking out more than one item, enter another item barcode into the **Item Barcode:** field and click **Check Out**.
6. When you are ready for another patron, click **Next Patron**. The fields and queue are cleared for you to enter the barcodes for the next check out.

Check In

Use the following steps to process library items that patrons return or textbooks/ equipment that students or teachers turn in.

1. Click the **Check In** tab.
2. Scan or enter the item's barcode in the **Item Barcode:** field.
3. Click **Check In** to move the item into the queue below.
4. Repeat steps 2 and 3 for the next item(s).

Upload Transactions

Use the following steps to upload *all* transactions, including check outs and check ins.

1. When your network is back up, click **Sync With Server** to upload these transactions into your database.

   If you try to sync transactions *before* configuring your settings, you will be prompted to complete that form.

2. The **Output** dialog box opens with circulation results listed in the **Successes** and **Errors** sections. Click **OK** to dismiss the dialog.

BookSystems®

Additional Resources

The steps for downloading and configuring the **Offline Circulation Tool** are also included in Atriuum's and Booktracks' online Help files.

Click **Help** from the **Menu Bar** to open an online Help topic related to the form you are using in Atriuum/Booktracks and then use the Table of Contents, Index, and Search features to find information on features within those products or in offline tools. Use the **Contact** button to learn how to reach Book Systems.
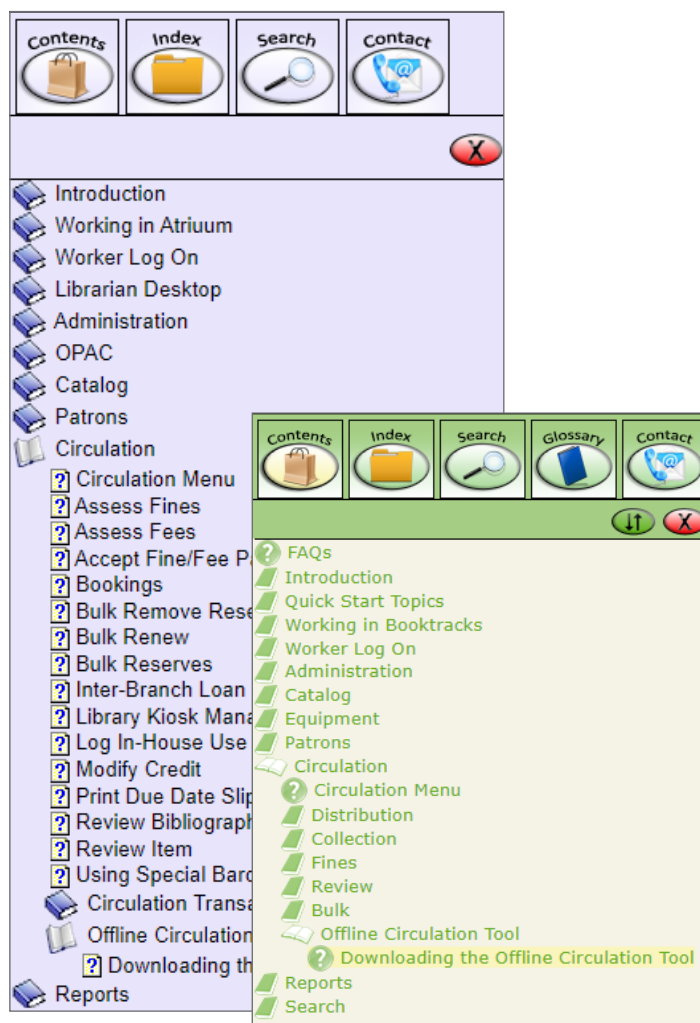
You can also click the **Help** button from the **Toolbar**.

The **Downloads** form provides other files, including handbooks and guides on Atriuum/Booktracks features, video tutorials, and more. Click **Administration** from the **Menu Bar**, and then click **Library** (Atriuum) or **General** (Booktracks). Click **Downloads** to open the corresponding form.

You can also click the **Downloads** button from the **Toolbar**.

Product Support

If you have questions about using the **Offline Circulation Tool** to circulate items that this document or our additional resources do not answer, please call Book Systems' Technical Support Staff at (888) 289-1216. You may also send an email to support@booksys.com. Business hours are Monday through Friday, 7 a.m. – 7 p.m. Central Standard Time.

BookSystems®