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Introduction

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

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 how to install and set up the tool as well as steps to use it for check out and check in transactions. If you already installed the tool, make sure you have **Version 0.5** by clicking **Help\About** from the top menu. If you need a newer version, follow the installation steps below.



This tool keeps track of basic circulation information only (patron barcodes and item barcodes). Details such as fines/fees and overdue items are not imported.

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** to open the list of administration submenus. Atrium users should click **Library**, and Booktracks users should click **General** to open the corresponding submenu.



All product links mentioned in this document are **dark blue bold**; however, the color you see will vary depending on which product you're using and, for Atrium 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** (if enabled).

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



These instructions are for Microsoft® Windows® customers, specifically using Windows™ 7. If you are working on a Mac®, click **AppleOfflineCircToolInstaller.dmg** to download the Mac version of the tool.

4. Follow the options onscreen to run the executable right now or save it to run later. If you save it, when you are ready to install, open the folder where you saved the executable, and double-click it. 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** wizard opens. Click **Next >** to begin.
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 18.5 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. If needed, click the **Create a desktop icon** check box to add a shortcut to your desktop.
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**.

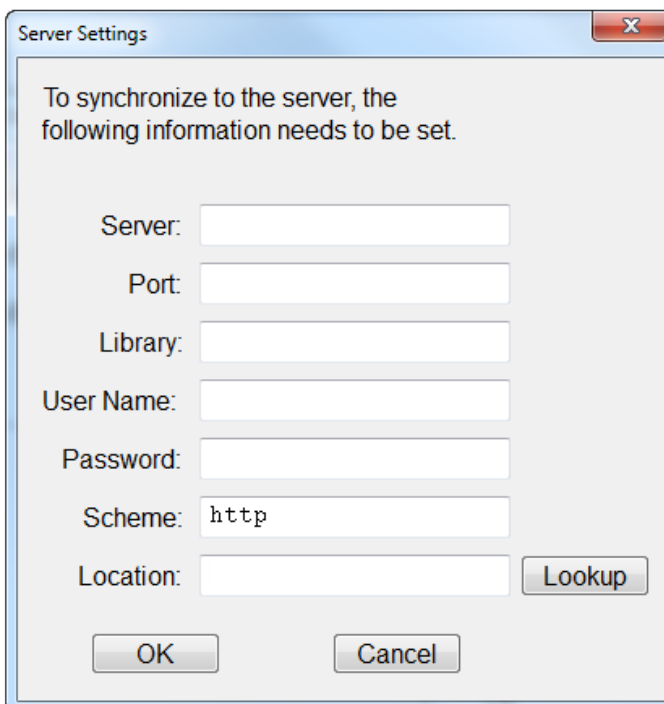


The **Server Settings** dialog box opens for new customers; see steps below. If you are upgrading to a newer version, the tool opens to the **Checkin** tab, and your server settings are retained from your previous version.

Configuration

After installation, you need to configure your **Offline Circulation Tool**, ensuring that it will communicate with the Atrium or Booktracks *Server* and send circulation transactions back to the applicable product. If the **Server Settings** dialog box is open, you can skip to step 3.

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 the text in your browser's address bar when you access your Atrium or Booktracks. 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.



Server Settings

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

Server:

Port:

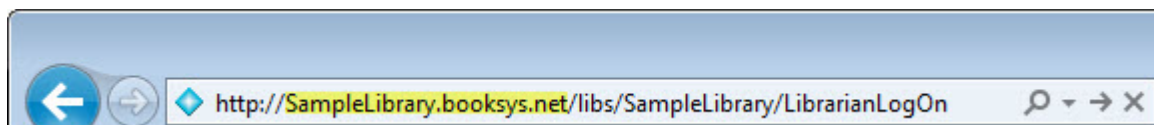
Library:

User Name:

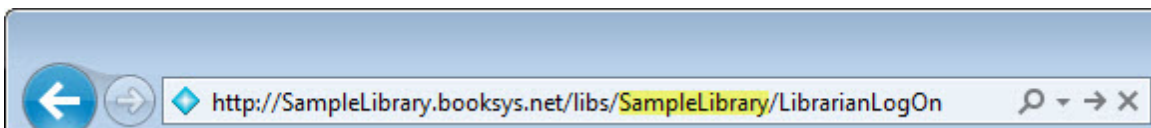
Password:

Scheme:

Location:



- In the **Port:** field, enter your port number; this will be **80** for most users. Contact your local technical support personnel if this number does not work.
- In the **Library:** field, enter the part of the address between **/libs/** and **/LibrarianLogOn**.



- In the **User Name:** and **Password:** fields, enter the same username and password you use to log on to Atrium or Booktracks.
- The **Scheme:** field lists **"http"** by default, but if needed for security purposes, your district/school might enter **"https"** instead.

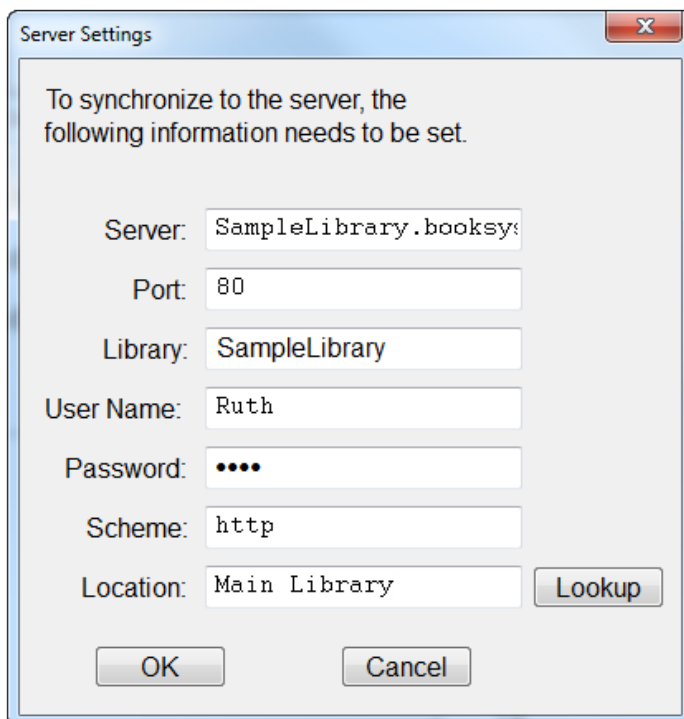
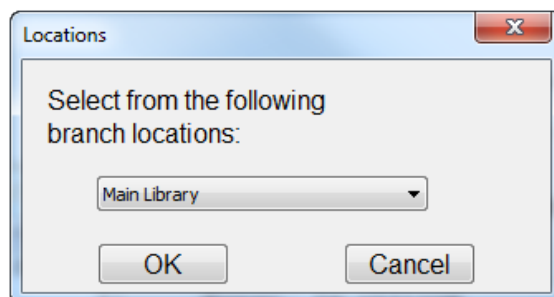
❗ If you use **"https,"** you need to enter **443** as your port number.

- If your product is part of a **Distributed** database, enter **Main Library** in the **Location:** field.

❗ Make sure the spelling, spacing, and capitalization of **Main Library** match exactly what you see in the example to the right. Otherwise, your configuration settings will not work correctly.

- If your product is part of a **Centralized** database, enter the name of the Branch or School Building where these circulation transactions will take place in the **Location:** field. Otherwise, you can click the **Lookup** button to open the **Locations** dialog box, use the drop-down list to make a selection, and then click **OK**.

4. When you are finished entering your server settings, click **OK** to save your changes. The window closes if there are no errors.

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 tracks basic circulation information only (patron barcodes and item barcodes). Details such as fines/fees and overdue items are not imported.

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 **Checkout** 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 **Checkout** 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 **Checkout**.
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.

The screenshot shows the 'Offline Circulation' application window with the 'Checkout' tab selected. It features a 'Patron Barcode:' input field, an 'Item Barcode:' input field, and a 'Checkout' button. Below these is a large empty rectangular area for the queue. At the bottom, there are 'Next Patron' and 'Sync With Server' buttons.

The screenshot shows the 'Offline Circulation' application window with the 'Checkin' tab selected. It features an 'Item Barcode:' input field, a 'Checkin' button, and a large empty rectangular area for the queue. At the bottom, there is a 'Sync With Server' button.

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 **Checkin** tab.
2. Scan or enter the item's barcode in the **Item Barcode:** field.
3. Click **Checkin** to move the item into the queue below the button.
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 do that now.

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

Additional Resources

The steps for downloading and configuring the **Offline Circulation Tool** are also included in Atrium'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 Atrium/Booktracks proper 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.

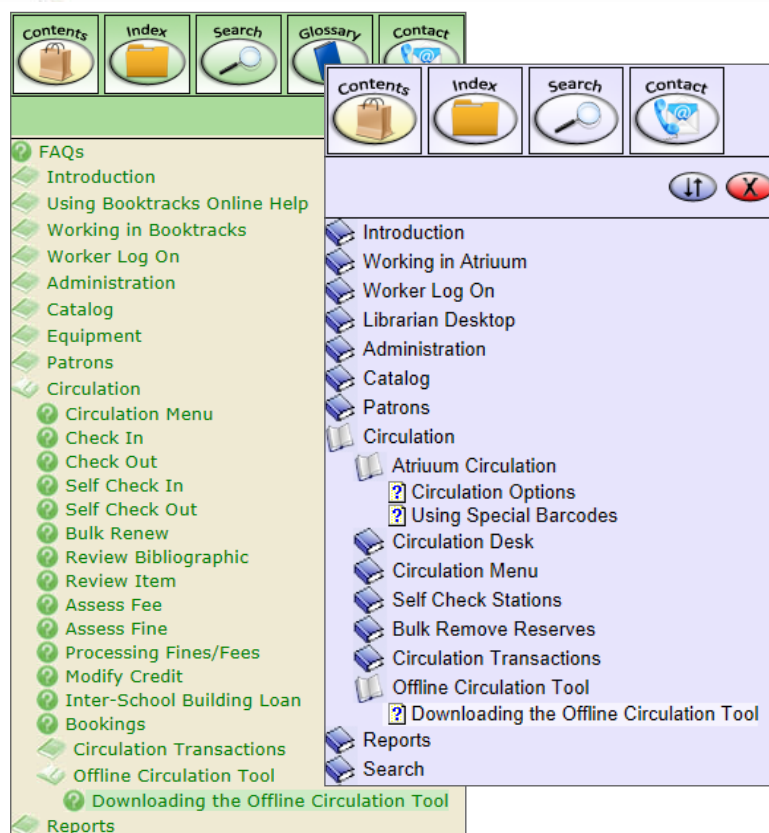


You can also click the **Help** button from the **Toolbar**.

The **Downloads** form provides other files, including handbooks and guides on Atrium/Booktracks features, video tutorials, and more. From the **Library Administration** (Atrium) or **General Administration** (Booktracks) submenu, click the **Downloads** link to open this 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 don't answer, please call Book Systems' Technical Support Staff at (888) 289-1216. You may also send an e-mail to support@booksys.com. Business hours are Monday through Friday, 7 a.m. – 7 p.m. Central Standard Time.

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