Use offline circulation and upload transactions


Learn how to use offline circulation to check in items, check out item, or delete transactions. Follow the instructions below to check in items, check out item, or delete transactions. The Offline Circulation client does not apply loan policies, trigger holds, honor patron restrictions, etc. because the connection to the system that applies such policies is unavailable.

Check out items

1. Select the Check Out tab.
2. In the Patron Barcode field, scan or type the patron barcode.
3. In the Item Barcode field, scan or type the item barcode.
4. In the Due Date field, type the due date or click the down arrow and use the calendar to select it.
5. Click Check Out or press <Enter>.
6. The item appears in the transaction area with a status of Awaiting Sync.
   Note: The patron barcode and due date are retained until you change them.

Check in items

1. Select the Check In tab.
2. In the Item Barcode field, scan or type the item barcode.
3. Click Check In or press <Enter>.
4. The item appears in the transaction area with a status of Awaiting Sync.

**Delete transactions**

You can delete transactions in the Offline client if they have been successful uploaded, entered by mistake, or failed to upload but cannot be resolved.

Note: Deleting transactions is permanent and should be performed with caution. Deleted transactions cannot be recovered.

1. On either tab (Check Out or Check In), click the transaction row you want to delete. To select multiple rows, highlight the first row and drag the cursor over the other rows. Or hold down the < Control > key while selecting the rows you want to remove.
2. In the bottom left corner of the client, click Clear.
3. A window will appear asking you to confirm the removal.
4. Click Yes.
5. The transactions are deleted.

**Synchronize (upload) transactions**

In order to synchronize transactions these conditions must be met:

- There must be at least one transaction (check in or check out), to make the Upload buttons active at the bottom right corner of each tab.
- WorldShare Circulation must be available.

1. On either the Check Out or Check In tab, at the bottom right corner of screen, click Upload. Note: All transactions with the status Awaiting Sync are processed when Upload is clicked, regardless of which tab you used or what kind they were (check in or check out).
2. In the The Enter Password window, type the Password of the account used to download the Offline Circulation client. Click OK.
   - If you forget or do not know the username or password needed to access the Offline Circulation client, repeat the download process.
3. The upload process starts. The upload can take a few seconds to a few minutes depending on the amount of transactions that need to be uploaded. You can continue to use the client while transactions are being uploaded. If your library has multiple instances of the client that have more than one transaction for the same item, only the most recent transaction for that item is uploaded.

To delete items after they have been uploaded, see Delete transactions.

**Status of transactions after uploading**

The following table describes the three statuses transactions can have after you upload them:
<table>
<thead>
<tr>
<th>SETTING</th>
<th>DESCRIPTION</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comms failure</td>
<td>WorldShare Circulation was not available or there was a network connection or internet problem.</td>
<td>Try uploading again at a later time.</td>
</tr>
<tr>
<td>Uploaded</td>
<td>The transaction was successfully uploaded.</td>
<td>Successfully uploaded transactions can usually be deleted. Follow local practice.</td>
</tr>
<tr>
<td>Upload failed</td>
<td>The patron or item barcode did not match the patron or item in WorldShare Circulation. Hover over the status to see more information.</td>
<td>If this error results from a data entry error, find the correct data, delete the transaction, and enter the transaction again. If this error results from patron or item barcodes not being in WorldShare Circulation, then add them to the system and use the client to upload the transactions again.</td>
</tr>
</tbody>
</table>

**Problems with uploading**

Sometimes transactions cannot be uploaded to WorldShare Circulation. These are some reasons why this may occur:

- *WorldShare Circulation is not available*. If the network or system is still down, it is not possible to upload transactions. These transactions will be marked as Comms failure (see table above), and you can attempt to upload them once the system is back up.
- *The barcode of the patron or item is unknown*. This means that the system could not find the related patron or item for the given barcode. This could be a typing mistake or the patron or item has not yet been created in the system.
  - If the barcodes are typos, delete the transaction and reenter the information with the correct details.
  - If the barcodes are correct, but not yet in the system, upload the transactions after the barcodes have been entered into the system.
- *Patrons have the same barcode*. Note: This error only applies to WMS libraries with group aware. If the client encounters a barcode that belongs to more than one patron within your group, it will be unable to upload the transaction.
- *Transactions that are uploaded in the wrong order for the same item will be ignored*. For example, if two patrons borrow the same book when the offline application is being used, but the transactions are uploaded in the wrong order, then the transaction that occurred at the latest time will be recorded by the system.

**Offline client support**

If you need to contact OCLC Support, be ready to supply this information:
1. The name and version of the operating system you are using.

2. The version of Java installed. Run the following command in a command-line shell and send us the result: `java -version`

3. The Offline Circulation client creates a log file (offline-circ.log) that is found in the `wms-offline-circ` subfolder of the user’s home folder, for example: `C:\Users\[myusername]\wms-offline-circ\offline-circ.log`