

performed. This parameter is usually only set to *false* when all of your Borrower barcodes have a check digit and your barcode scanners do not automatically remove the check digit.

- Parameter No.**3354** *clientRearrangeBarcodes* - This parameter determines if both the *libraryCode* and *clientKeep7th* parameters are enabled for Borrower barcodes regardless of their actual value. That is, even if the *libraryCode* has a value and *clientKeep7th* is set to *false*, they will not be used unless the *clientRearrangeBarcodes* parameter is set to *true*.
- Parameter No.**3351** *clientIncrementingPosition* - This parameter determines which character in Borrower barcodes is incremented when a new barcode is automatically generated. The default value is 6. An example barcode is B123448888 and the next barcode is B123458888, so the *clientIncrementingPosition* is set to 6 as it is the sixth character that is incremented. Completion or editing of parameters is located in the Parameters chapter. For further details see "Adding or Editing Parameters" on page 25-6.

12.3 Offline Circulation Desk

This section covers the following Offline Circulation Desk (OCD) topics:

- "Introduction" on page 12-5
- "Default Loan Period" on page 12-5
- "Using OCD" on page 12-6

12.3.1 Introduction

The OCD function is used to perform basic loans and returns on a local computer when a connection to the library server cannot be made. When the connection is re-established, the circulation transactions can be imported into the system. As only basic loans and returns can be performed, you may need to re-do some transactions in the Circulation Desk that the OCD cannot perform.

Once the import is successfully performed, the OCD data file must be deleted so that the same transactions are not imported again.

Note: The OCD functionality requires the Client Files to be installed, which is covered in the *Installation Guide*, on the local computer that will run OCD.

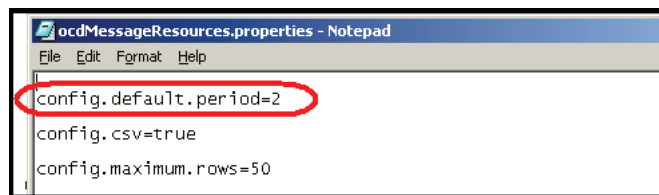
12.3.2 Default Loan Period

OCD does not use or check the library's standard Lending Rules; instead all loans are made for a predefined number of days regardless of both the Borrower's or the Resource's loan categories. However, each individual loan can be made for a

different period. For further details see "Loans" on page 12-7.

The predefined loan period for OCD loans is 2 days. This value can be changed by performing the following steps on the computer that the OCD will be used from:

1. Open **Windows Explorer**.
2. Navigate to **C:\Program Files\Softlink International\Library Client\messageResources**
3. Double click the file **ocdMessageResources.properties**; the file should open in a text editor such as Notepad.
4. The first entry specifies the loan period in days; the initial value is 2.



5. Change this **number**, then **save** and **close** this file.

The specified number of days must be a round number, decimals cannot be used.

12.3.3 Using OCD

This section covers the following OCD usage topics:

- "Opening OCD" on page 12-6
- "Loans" on page 12-7
- "Returns" on page 12-8
- "Importing OCD Transactions" on page 12-8
- "Deleting the OCD Data File" on page 12-10

12.3.3.1 Opening OCD

To open OCD on the local computer perform the following steps:

1. Open **Windows Explorer**.
2. Navigate to **C:\Program Files\Softlink International\Library Client\ocd**.

3. Double click the file **ocd.bat**; this opens the OCD window.

Time	Action	Borrower	Loan Period	Item

The OCD window can be opened and closed any number of times prior to the transactions being loaded into the system. To close the OCD, click the cross in the top right corner of the screen.

If upon opening OCD there are transactions from a previous day that have already been imported, then the *OcdData.csv* file should be deleted so these old transactions are not inappropriately run again. For further details see "Deleting the OCD Data File" on page 12-10.

12.3.3.2 Loans

To loan a Copy perform the following steps:

1. Scan the Borrower's barcode into **Borrower** field (see the following image).
2. If required, change the **Loan Period**.

The loan period is not reset between individual loans or when a new Borrower is selected. It only resets to the default value when the OCD screen is initially opened.

3. Scan the item's **barcode**, or type the barcode and click **Loan**.

Time	Action	Borrower	Loan Period	Item

The details of the loan are then displayed.

Time	Action	Borrower	Loan Period	Item
9:58 AM, 25Feb08	Loan	B1241	2	S1009

The most recent transaction is displayed at the top of the list. Only the first 50 transactions are shown.

12.3.3.3 Returns

To return a Resource scan the Resource's barcode into the return **Item** field, or type it and click the **Return** button.

The screenshot shows the 'Offline Circulation Desk' interface. On the left, under the 'Loan' section, there are input fields for 'Borrower:', 'Loan Period:' (with the value '2'), and 'Item:', along with a 'Loan' button. On the right, under the 'Return' section, there is an 'Item:' input field containing 'R1003' and a 'Return' button. This 'Return' section is highlighted with a red rounded rectangle. At the bottom of the interface is a table with the following data:

Time	Action	Borrower	Loan Period	Item
10:15 AM, 25Feb...	Return			R1003

The details of the return are then displayed.

Time	Action	Borrower	Loan Period	Item
10:15 AM, 25Feb...	Return			R1003

As there is no connection to the library server, the returning Borrower's barcode is not displayed.

12.3.3.4 Importing OCD Transactions

Once a OCD transaction is made, the file *OcdData.csv* is created in the C:\Program Files\Softlink International\Library Client\ocd folder. The contents of this file, that is the loans and returns, can be imported once a connection to the library server is re-established.

Once the transactions are imported, the *OcdData.csv* file should be deleted to prevent the same transactions from being loaded multiple times. This file can also be manually deleted if any mistakes are made; the system will recreate the file when OCD is used again. For further details see "Deleting the OCD Data File" on page 12-10.

To load the OCD transactions, perform the following steps from the computer that the OCD function was used from:

1. Log into the system.
2. Navigate to **Management > Import > OCD Import**.

- Click the **Browse** button, then select the file **OcdData.csv** from **C:\Program Files\Softlink International\Library Client\ocd**.

System

Import an OCD file

Filename: **Browse...** **Import** **Cancel**

File encoding: **UTF-8**

Enter or browse the full path and name of the OCD file you wish to import.

The encoding used for the OCD file. If unsure use UTF-8.

- Click the **Import** button.

System

Import an OCD file

Filename: **C:\Program Files\Softlink International\Library Client\ocd\OcdData.c** **Browse...** **Import** **Cancel**

File encoding: **UTF-8**

Enter or browse the full path and name of the OCD file you wish to import.

The encoding used for the OCD file. If unsure use UTF-8.

If it has already been imported, the message "This file has been processed previously" is displayed and the file is not imported.

System

Errors occurred during the import

This file has been processed previously.

Any transactions that would normally require some user input are not processed by OCD and their details are displayed (see the following image). This screen should be printed and the transactions manually performed in the Circulation Desk.

System

OCD Import Results

Processing complete. Please delete the import file.

Time	Action	Borrower	Copy	Result
25 February, 2008	Return		B1241	Could not locate barcode B1241.
25 February, 2008	Return		R1002	This item, R1002, of Basic Research Methods for Librarians is reserved for Smith, Tom (9A). Do you wish to hold the item for its reservation?

Some of the failed transaction messages that can be displayed are:

- Bookable copies cannot be processed from an offline file - Copies with a RLC that is bookable can't be issued via OCD.
- ILL Borrowers cannot be processed from an offline file - Borrowers that are setup as ILL Borrowers cannot be issued Copies via OCD.

- This item X is reserved for Borrower Y. Do you wish to hold the item for its reservation? - Returned Copies that are ready to fulfil a reservation can't be returned via OCD.
- This item X is on loan to another Borrower - Copies that are loaned to a Borrower cannot be directly issued to another Borrower via OCD.
- Borrower with barcode X was not found - This barcode does not match any Borrower records.
- Could not locate barcode X - This barcode does not match any catalogued Copy records.

12.3.3.5 Deleting the OCD Data File

Once the OCD transactions have been successfully imported, the OCD data file must be deleted so it is not imported a second time. To delete this file, perform the following steps from the computer that used the OCD function:

1. Open **Windows Explorer**.
2. Navigate to **C:\Program Files\Softlink International\Library Client\ocd**
3. Delete the file **OcdData.csv**.