Alma Offline Circulation

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Introduction

Alma Offline Circulation is for times when the online version of Alma is not available (for instance, if there's an internet outage, the two-factor authentication system is having problems, or Alma itself is down). It can be used to loan local items to local patrons by saving the data into a file that will be uploaded into the online version of Alma once it's available again.

We strongly encourage you to **install and try out Alma Offline Circulation** and make sure everything is working correctly *before* you need it, since it'll be much harder to troubleshoot any issues if the internet is down. In addition, you may want to download this documentation and save it someplace you can access without going online, such as on your computer's desktop.

The Basic Steps section below summarizes the full process. Detailed instructions with screenshots start at the Installing the Alma Offline Circulation Utility section.

Additional documentation for Alma Offline Circulation can be found at the following links:
- CARLI's documentation: https://www.carli.illinois.edu/products-services/i-share/alma/install-alma-offline-circ-util
- Ex Libris's documentation: https://knowledge.exlibrisgroup.com/Alma/Product_Documentation/010Alma_Online_Help_(English)/030Fulfillment/070Advanced_Tools/010Loans/040Offline_Circulation

Basic Steps

Before Alma is Down

1. Install the Alma Offline Circulation Utility.
   a) Open the Software Center from your computer's desktop.
   b) Click the "Alma Offline Circulation" icon and then click "Install".
2. Test Alma Offline Circulation.
   a) Open the program by opening the Start menu and clicking the icon. If it doesn't show up immediately, search for "offline" to pull it up.
   b) Type something like "test" or "example" in the Borrower and Item Barcode fields. Click "Loan" and then click "Save to file".
      i) If it gives the error "Failed to create directory ..\..\OffCirc\files\. Can't save data. The system cannot find the path specified," close and uninstall the program. Delete any shortcuts on the desktop and taskbar as well. Try reinstalling it again from the Software Center.
         (1) If this doesn't fix the problem, contact Library IT for assistance.
      ii) If it doesn't give this error, continue.
   c) Open the Offline Circulation file to check that it saved the data correctly and see if you can delete the file. (For more details, see the section Checking the Data in the Offline Circulation File.)
      i) Open File Explorer and go to the C: drive. Go to C:\Alma Offline Circulation\OffCirc\files and locate the "OffCirc.dat" file. Right-click it and open it with a program such as Notepad or Notepad++.
      ii) Check that the OffCirc data file includes the test data you entered and no other data.
         (1) If that's the case, close and delete it.
         (2) If there is other data, check if it should be uploaded or deleted.
            (a) If it's all safe to delete, close and delete the OffCirc file.
            (b) If there is data that needs to be uploaded into Alma, do that. See the section Uploading the Offline Circulation File into Alma for details. (Because your test entry didn't involve actual borrower or item barcodes, the testing data will just return an error, while the actual patron transaction data will be uploaded.)

While Alma is Down

- Use Alma Offline Circulation to loan local items to local patrons (including Courtesy Card patrons). Alma Offline Circulation *cannot be used* for I-Share items or I-Share patrons.
- **Do not** use Alma Offline Circulation for returns. Instead, set those aside with a note giving the date they were returned and saying that they'll need to be checked in once Alma is back up.
- Every time you scan in borrower or item barcodes, double-check that what you've scanned is correct. It's possible to only partially scan a barcode or to scan the wrong barcode on an item, and Alma Offline Circulation can't check that against a database to let us know that we've made an error.

1. Open the program by opening the Start menu and clicking the icon. If it doesn't show up immediately, search for "offline" to pull it up.
2. To loan local items to a local patron:
   a) Scan in the barcode on the patron's card into the "Borrower" field.
   b) Scan in the item's barcode into the "Item barcode" field.
   c) Continue scanning in all the items the patron wants to check out.
   d) Click the "Save To File" button.
   e) Delete the patron's barcode from the "Borrower" field.
3. **Note:** If you enter some information but then leave it alone without scanning in anything else for a minute, the system will time out and some of the data you entered may disappear. See the Appendix: Time-Out Function section for information on what happened.
4. **Note:** If it gives the error "Failed to create directory ..\..\OffCirc\files\. Can't save data. The system cannot find the path specified," try opening the program in a different way (for instance, if you used the Start menu and there's an icon on the taskbar or the desktop, try those instead).
   a) If that works, use that while Alma is down. Fix the issue once the internet is available again (see the Opening and Testing Alma Offline Circulation section for details).
   b) If that doesn't work, check with your supervisor for your unit's policy on what to do if you can't use either Alma or the Alma Offline Circulation program. Fix the issue once the internet is available again (see the Opening and Testing Alma Offline Circulation section for details).

After Alma is Back Up

1. Upload the OffCirc data file from *each* computer where Alma Offline Circulation was used.
   a) In Alma, open the Fulfillment menu and click on "Offline Circulation" under the "Advanced Tools – Loans" heading.
   b) Click the file folder icon to the right of the "File name" field.
   c) This will open File Explorer. Go to the C: drive, and then open "Alma Offline Circulation", and then "OffCirc", and then "files".
   d) Open the "OffCirc.dat" file. This will return you to the Alma screen, which now has the OffCirc.dat file.
   e) Click the "Upload and Validate File Content" button. Click the "Refresh" button as needed until the status says "Completed Successfully".
   f) Check the "Entities Failed" column.
      i) If it's 0, delete the OffCirc data file.
      ii) If it's more than 0, address any errors before deleting the OffCirc data file.
2. Check the data if the number in "Entities Failed" was more than 0.
   a) Click the "…" button on the right side, then select "View Report". Take note of the errors, and what line they're on.
      i) "Item not found" means that the item's barcode in the data file doesn't match with an item in Alma. This may have been due to a partial scan or scanning the wrong barcode.
         (1) Check with your supervisor for your unit's policy on what to do in this situation.
         (2) If you scanned the wrong barcode, it may have been the item's ISBN or ISSN, which can be used in Alma to narrow down which item it might be. To find the borrower's barcode, check the OffCirc data file (see instructions below).
      ii) "User not found" means the borrower's barcode doesn't match with any patron's current barcode in Alma.
         (1) Contact [Central Access Services](#) with the barcode so they can look up the patron and their current barcode.
      iii) "A later action on this item happened" means that the offline transaction wasn't processed because something was done with this item after the offline transaction took place but before OffCirc data file was uploaded. This is usually because the item was returned in Alma before the file was uploaded.
      Note: This error generally appears twice on the Report Table.
         (1) This error doesn't require any action from us.
   b) If you need additional information to address errors, check the OffCirc data file.
      i) In File Explorer, go to the C: drive and then go to C:\Alma Offline Circulation\OffCirc\files and locate the "OffCirc.dat" file.
      ii) Right-click the "OffCirc.dat" file and select a program to open the file. You may have to click "Choose another app" to find a program that will work.
         (1) Notepad and Notepad++ are the simplest ways to view the file, but other programs such as Word and Excel will work.
      iii) The file will pop up. You may need to enlarge the window to view all of it.
      iv) The file will have the following information for each transaction:
         (1) The date and time the transaction took place, in the format of YYYYMMDDHHMM (year, month, day, hour, minute)
         (2) An L or an R (for a loan or a return, respectively).
         (3) The item's barcode.
         (4) Separately, the borrower's barcode (if it was a loan).
      v) Once any errors have been addressed as needed, delete the OffCirc data file.

3. Delete the OffCirc data file from *each* computer where Alma Offline Circulation was used.
   a) If you have the file open, close out of it.
   b) Open C:\Alma Offline Circulation\OffCirc\files.
   c) Click the "OffCirc.dat" file to select it.
   d) Delete it by either pressing the "Delete" key on your keyboard or right-clicking and selecting the "Delete" option or the trash can icon.

Installing the Alma Offline Circulation Utility

1. Open the Software Center from the icon on your computer's desktop.

2. Click on the Alma Offline Circulation icon in the Applications tab.
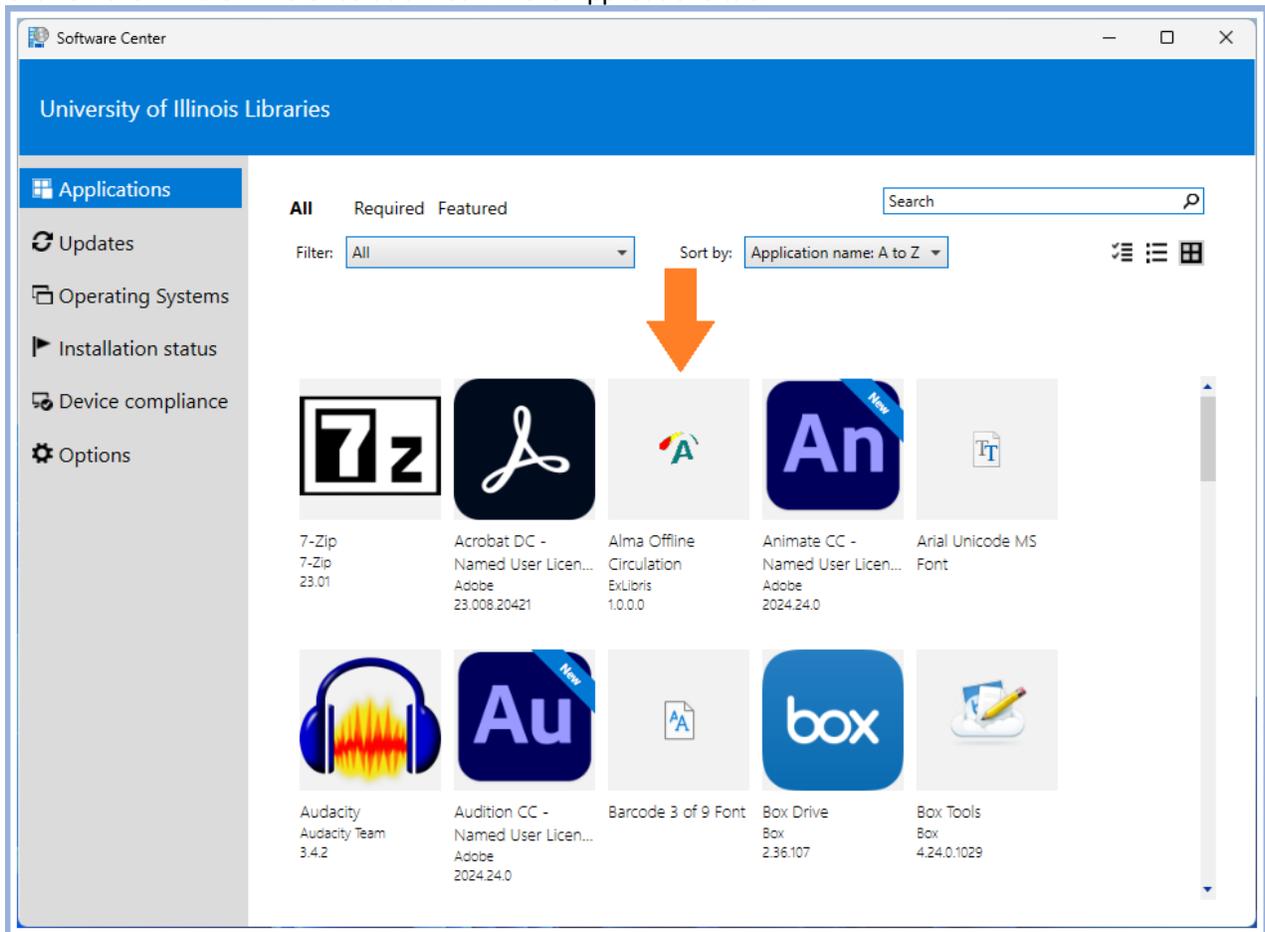
3. Click "Install".
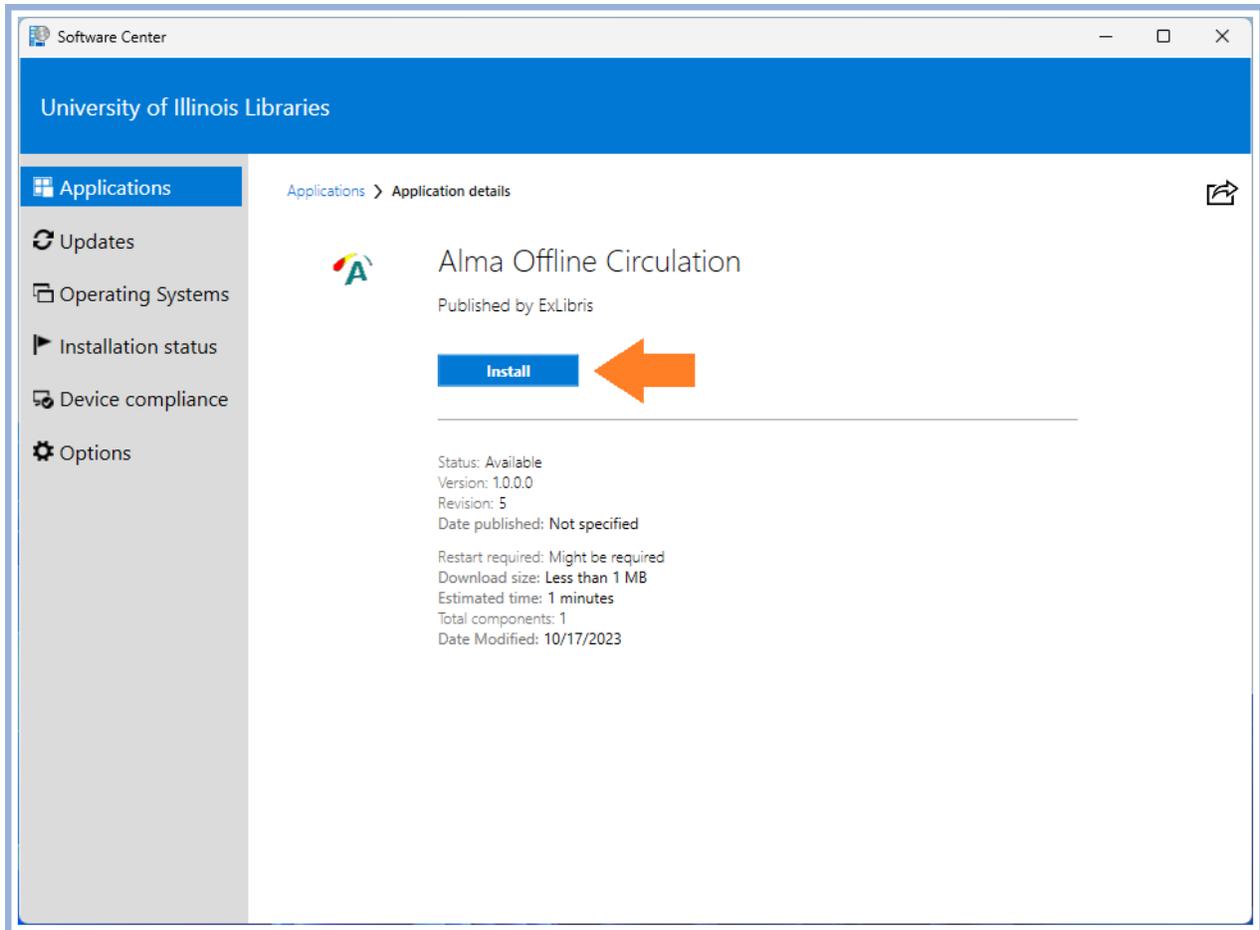
4. Once the program has been installed, we recommend that you open it and test it out to make sure everything is working correctly, and to get some practice using it. See the Opening and Testing Alma Offline Circulation section below.

Opening and Testing Alma Offline Circulation

1. From the Start menu, search for the word "offline". This should pull up the program in the menu. Once it comes up, click on the icon to open it.
   Note: It may have the name "Alma Offline" or "Offline Circulation", so it may not come up if you include "Alma" in your search.
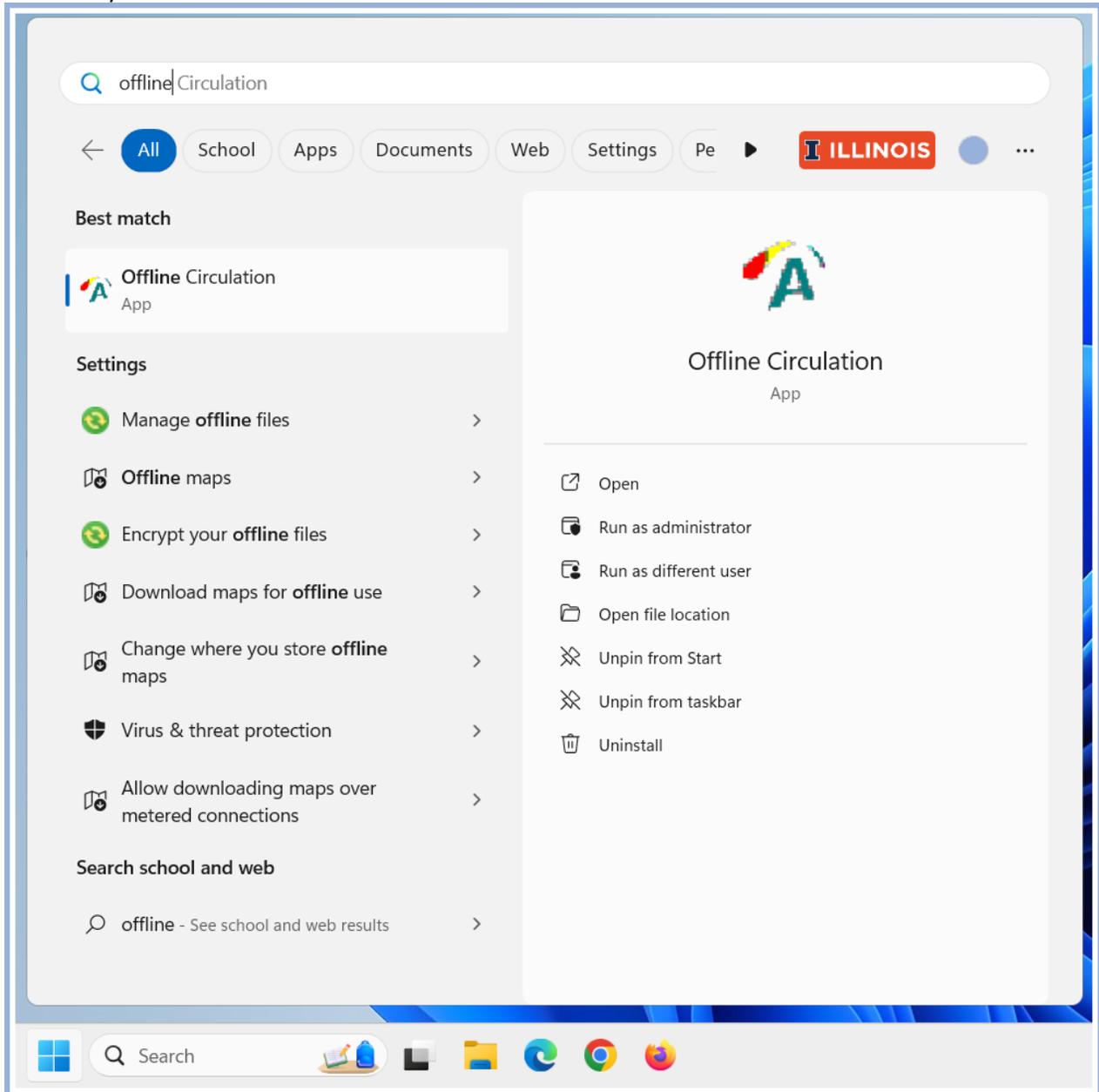
2. It's **highly recommended** that you test the program when you first open it to make sure it's working correctly, as well as checking to see if there's a data file from a previous session that may need to be deleted.

3. To start, type something like "test" or "example" in the Borrower and Item barcode fields. Then click the "Loan" button and then the "Save to file" button.

4. It may give the error "Failed to create directory ..\..\OffCirc\files\. Can't save data. The system cannot find the path specified." (If it doesn't, go to step 5.)
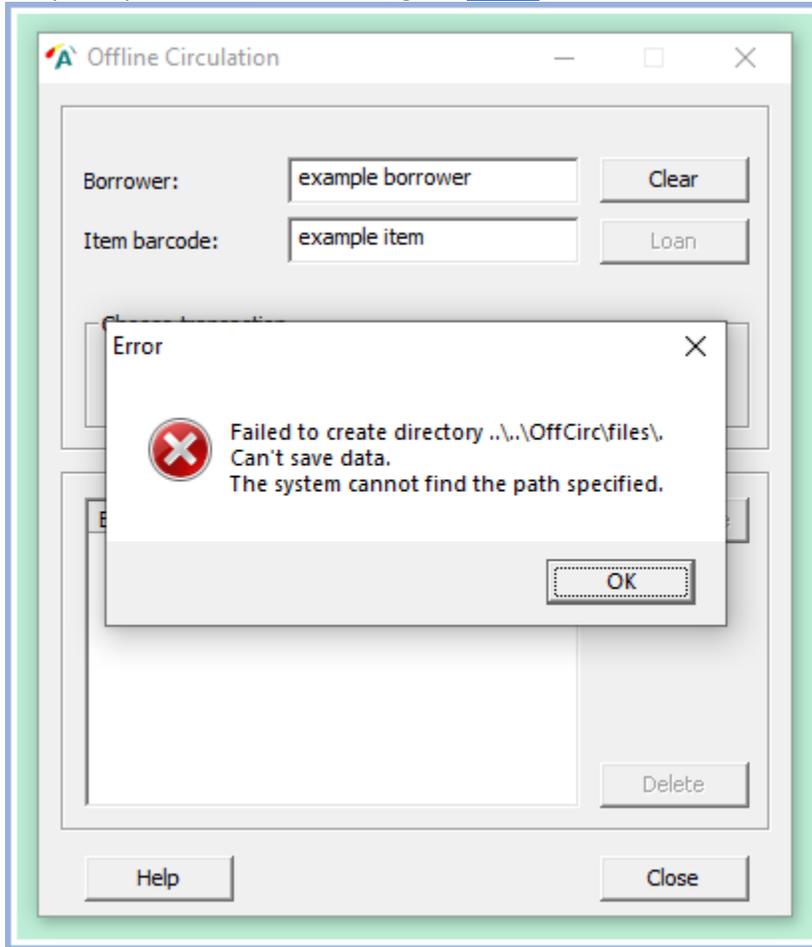
a. If you get this error when you have an internet connection, close and uninstall the program through the Software Center. Delete any shortcuts on the desktop and taskbar as well. Then reinstall the program through the Software Center and test it again.
   i. If you continue to get this error after reinstalling the program, or if you have problems with uninstalling and reinstalling the program, contact Library IT for assistance.

b. If you get this error when your internet connection is down, try opening the program in a different way. For example, if you opened it by searching the Start menu, try opening it with the desktop icon or the taskbar icon, if it has those. Sometimes changing how you open the program will bring up a version that doesn't have this issue.

i. If this doesn't work, check with your supervisor for your unit's policy on what to do if you can't use either Alma or the Alma Offline Circulation program.

ii. Whether or not it worked to try a different way of opening the program, you'll need to fix the issue once you have an internet connection again. After you've taken care of uploading data as needed, uninstall the program. Delete any shortcuts on the desktop and taskbar as well. Then reinstall the program and test it again.
   1. If you continue to get this error after reinstalling the program, or if you have problems with uninstalling and reinstalling the program, contact Library IT for assistance.

5. If there are no errors, the first part of the test was successful. Next, open the Offline Circulation file to check that it saved the data correctly and to see if you can delete the file.
Note: This is the file "OffCirc.dat" in the C: drive under C:\Alma Offline Circulation\OffCirc\files. To open it, right-click the name and select a program to open it with, such as Notepad or Notepad++. For more detailed instructions, see the section Checking the Data in the Offline Circulation File.)

6. The OffCirc file should include the test data that you just entered and no other data. (For help with interpreting the data in the file, see the section Checking the Data in the Offline Circulation File.) If that's the case, close and delete the OffCirc file.
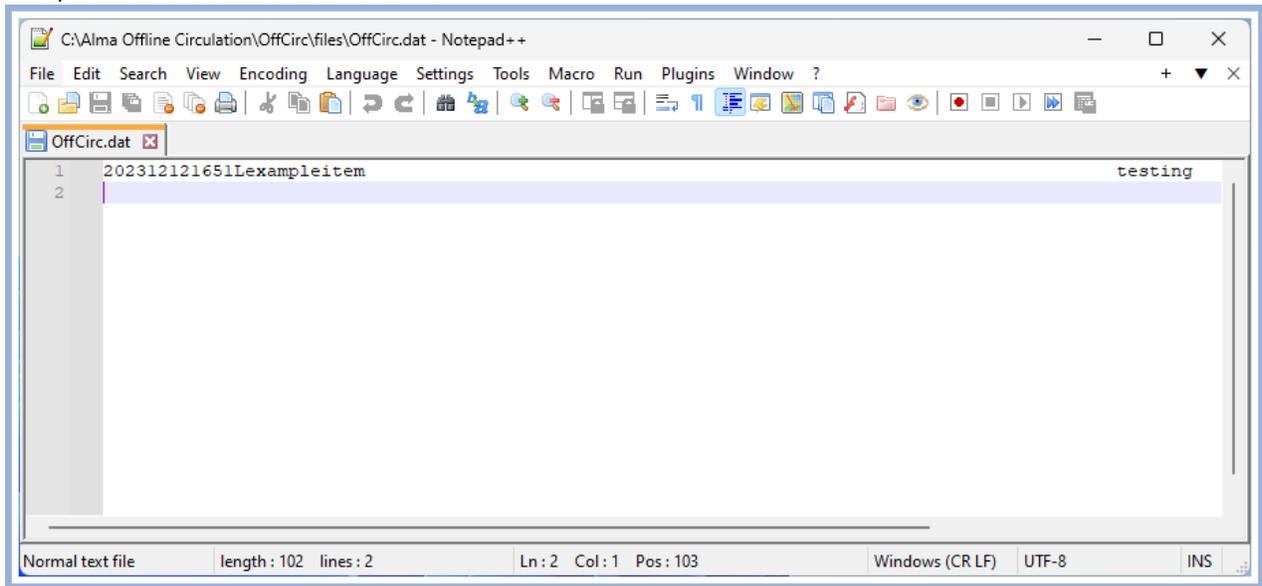
7. If there is other data, check if it should be uploaded or deleted. (Past data will remain in the file until the file is deleted, even if it was already uploaded to Alma.)
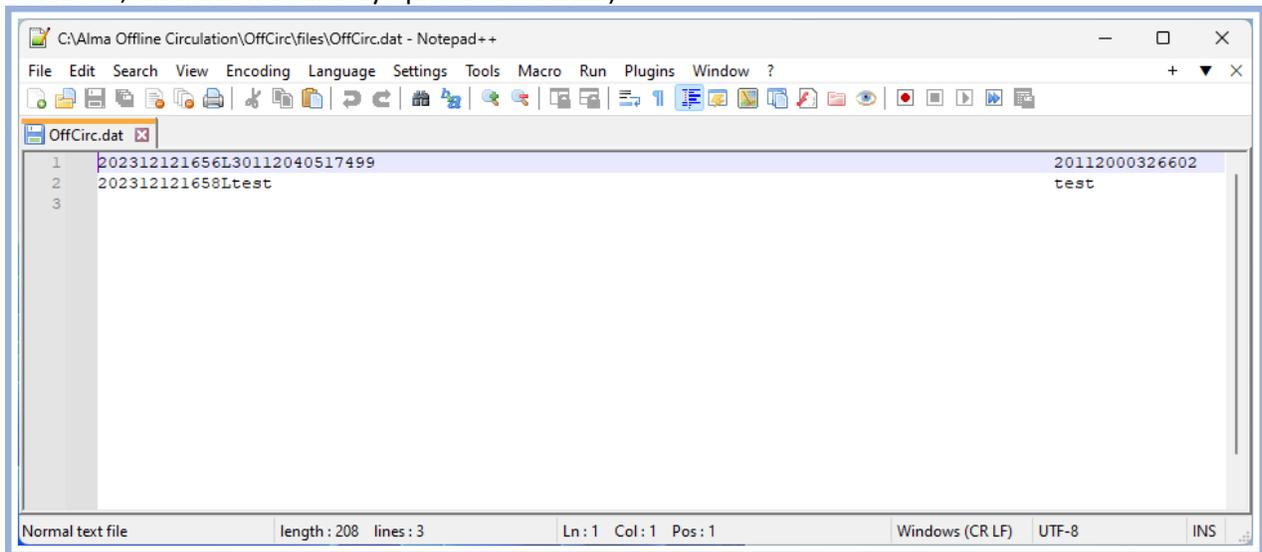
    a. If it's all safe to delete, then close and delete the OffCirc file.
    b. If the file has patron transaction data that needs to be uploaded, do that when Alma is next available.
        i. Because your test entry didn't involve actual borrower or item barcodes, the testing data will just return an error, while the actual patron transaction data will be uploaded.
        ii. For instructions, see the section Uploading the Offline Circulation File into Alma.

Loaning Items to Patrons

- Alma Offline Circulation can be used to loan local items to local patrons (including Courtesy Card patrons). It **can't be used** to loan any items to I-Share patrons, or to loan I-Share items to any patrons. Those transactions will have to wait until the online version of Alma is available again.
  Note: This program does show an option for returns as well as loans, but *we recommend against using it for returns*. Doing so can introduce complications that are difficult to reverse. Also, it won't print out important slips (such as Transit Slips for items from other locations). Instead, we recommend that you set all the returns aside in one place, with a note giving the date they were returned and saying that they'll need to be checked in using the online version of Alma once it's available.

- The program may cover your entire screen. It's okay to close and reopen the program as needed, as long as you save the data before closing it. (The "Minimize" button near the top right corner of the central window can be used as well, but it works somewhat inconsistently.)
  Note: To close the program, use either the "Close" button or the "X" at the top right corner of the central window, as there is no "X" in the top right corner of the screen.

- The data is saved to the computer, not to a specific user. If multiple users log on to a computer, use the program, and log off, the data will all still be saved to the same file.
  Note: If multiple computers are used, even if they're used by the same person, each computer will have its own file, and each file will have to be uploaded once the regular Alma program is available again. Try to limit the number of computers that you use Alma Offline on, as this will make the process simpler.

- The program has a time-out function that goes into effect if you've entered some data but you haven't done anything else in the program for one minute. See the Appendix: Time-out Function section below for more details.

- Alma Offline cannot check the data we enter against a database, so we need to be especially careful. It's easy to scan the wrong barcode (such as the ISBN barcode on the back of a book) or only do a partial scan so that some of the number isn't entered. It may not be possible to fix these errors after the fact, so **always** double-check what has been entered.

1. By default, the cursor starts out in the "Borrower" field, and the radio button under "Choose transaction" is set to "Loan".
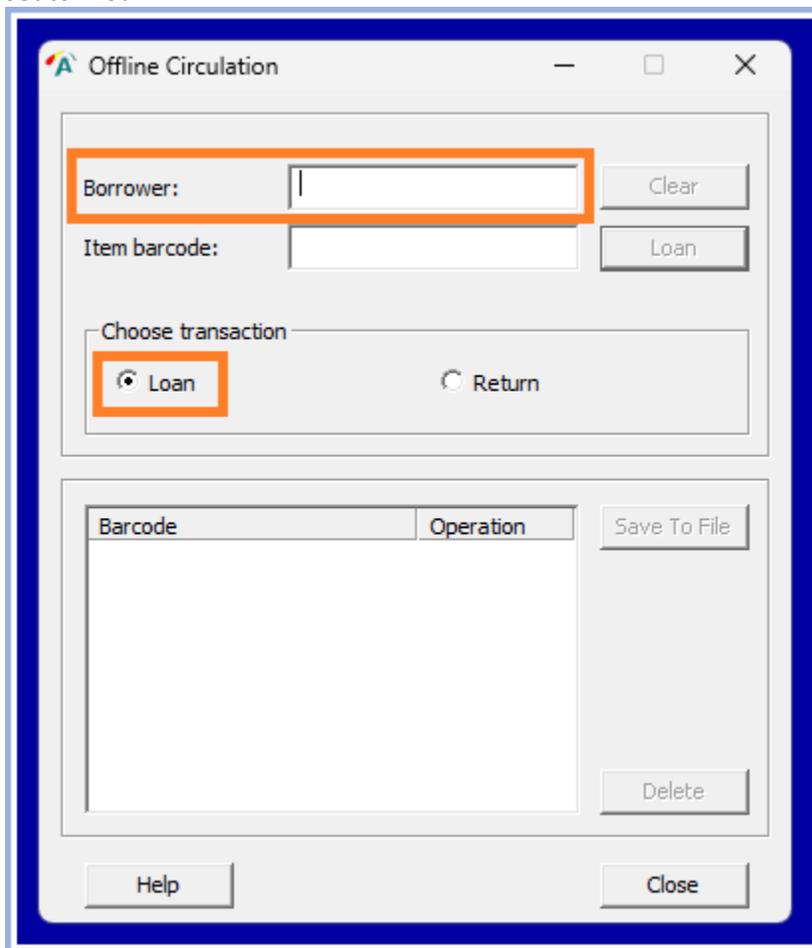
2. Scan in the patron's card. This should enter the patron's barcode number (which should start with "2011…") in the "Borrower" field, and automatically move the cursor to the "Item barcode" field.
   Note: If it doesn't do that, double-check that the number is correct, and then manually move the cursor to the "Item barcode" field.
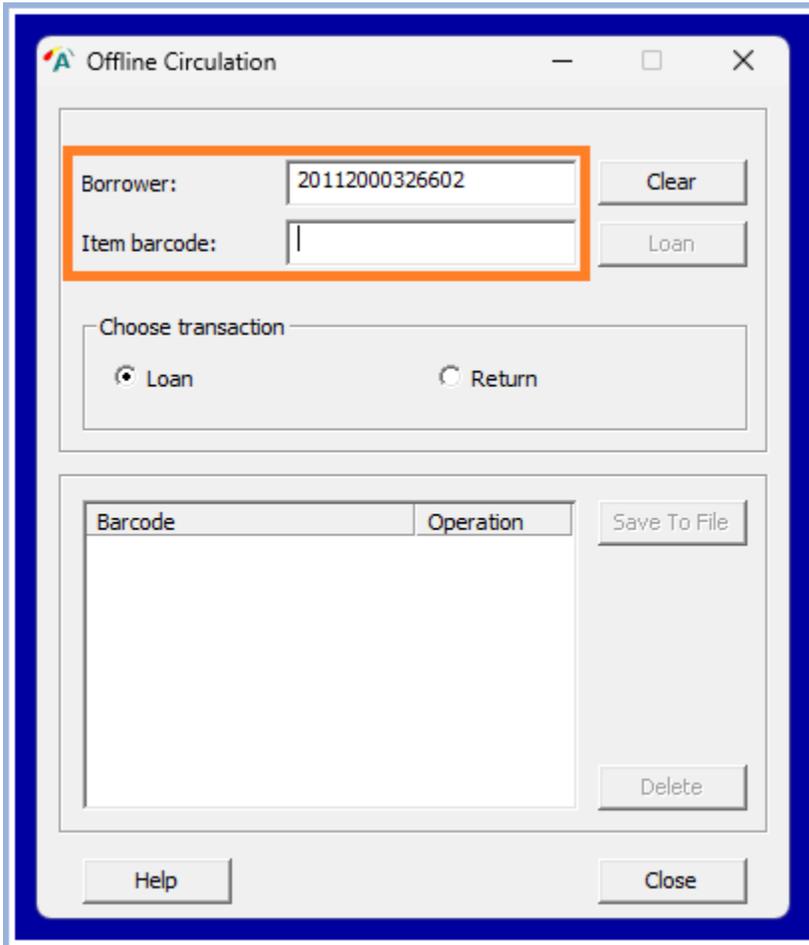
3. Scan in the local item(s) that the patron wants to check out. Each item you scan should enter a 14-digit barcode starting with "30112…" in the lower section, with the word "Loan" in the "Operation" column. It should also automatically return the cursor to the "Item barcode" field.
   Note: If it doesn't do that, double-check that the number is correct, and then click the "Loan" button.
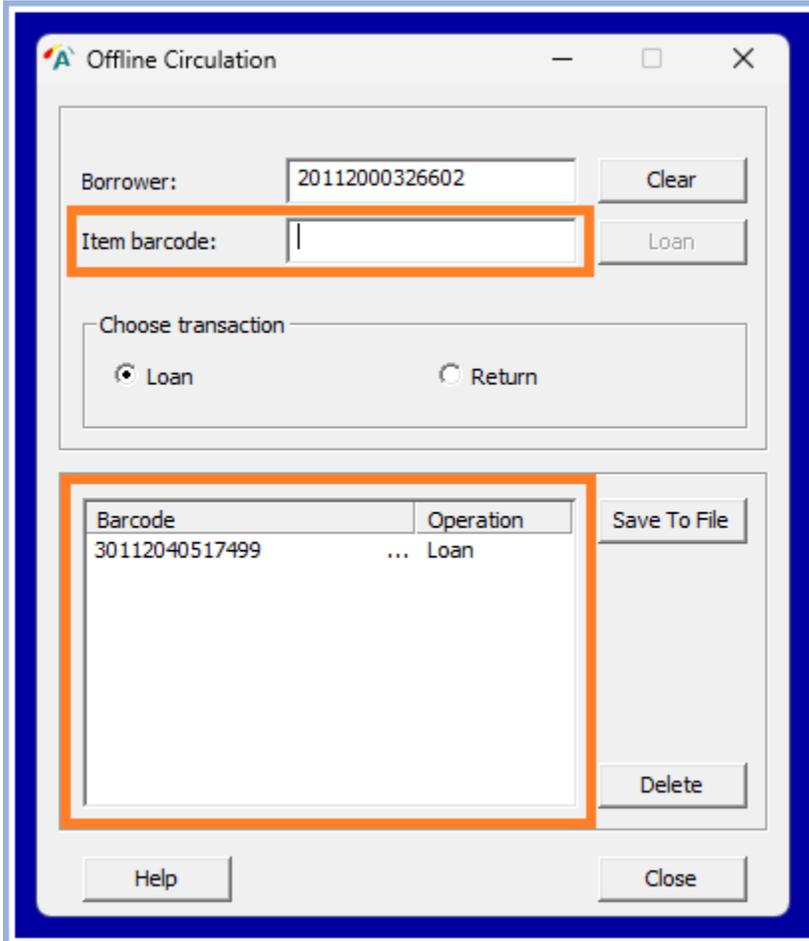
Note: If you make an error when entering the item barcode (for example, if you scan in the ISBN instead of the item barcode, or the barcode is partially covered and only part of the number is scanned), click on the barcode in the list to select it, and then click the "Delete" button. Once the incorrect barcode is deleted, manually move the cursor back to the "Item barcode" field to continue scanning.
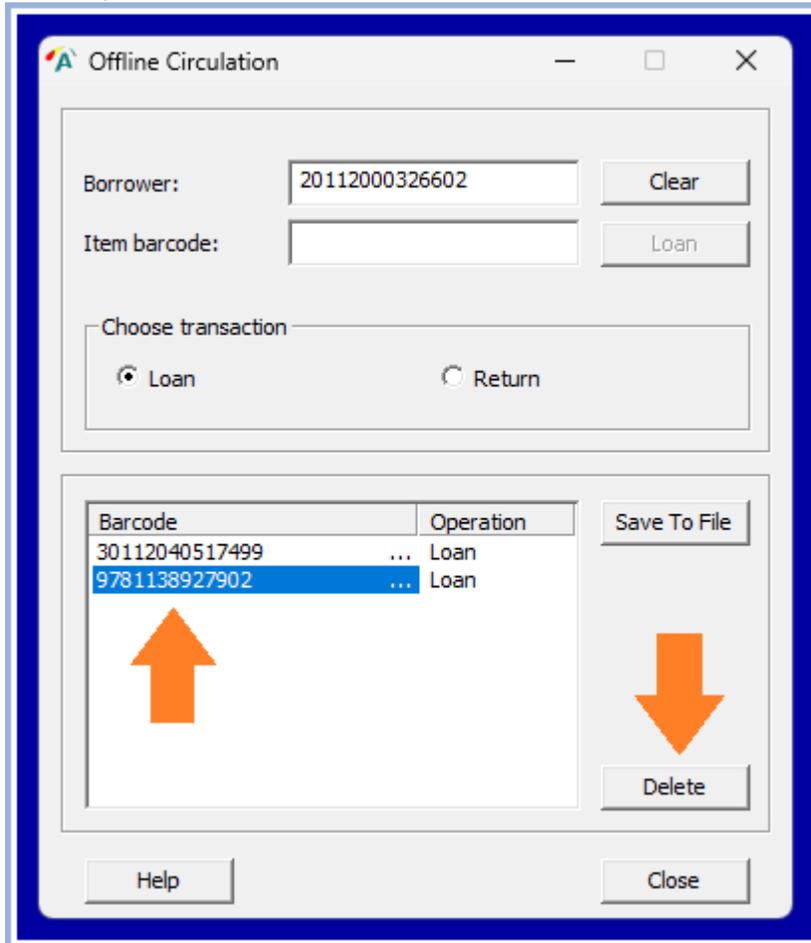
4. Once you've checked out all of the items to that patron, click the "Save To File" button to save the data.
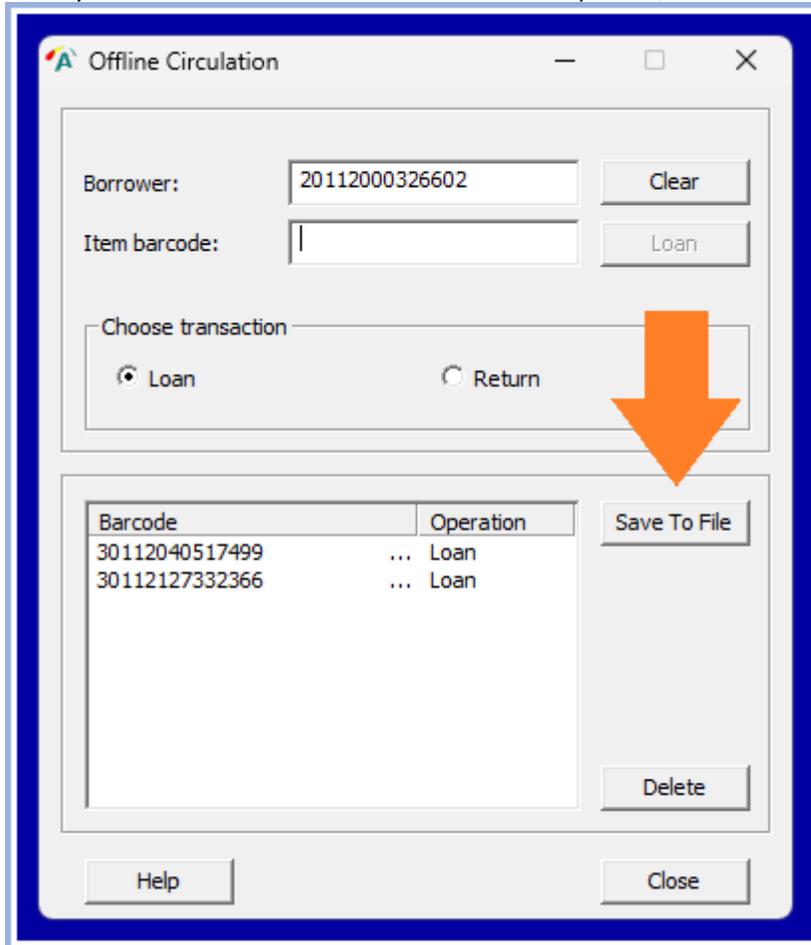
5. This will save the information and clear the item barcodes from the screen, but the patron's barcode will still be in the "Borrower" field and should be removed. You can either delete it manually from the "Borrower" field, or click the "Clear" button next to it.
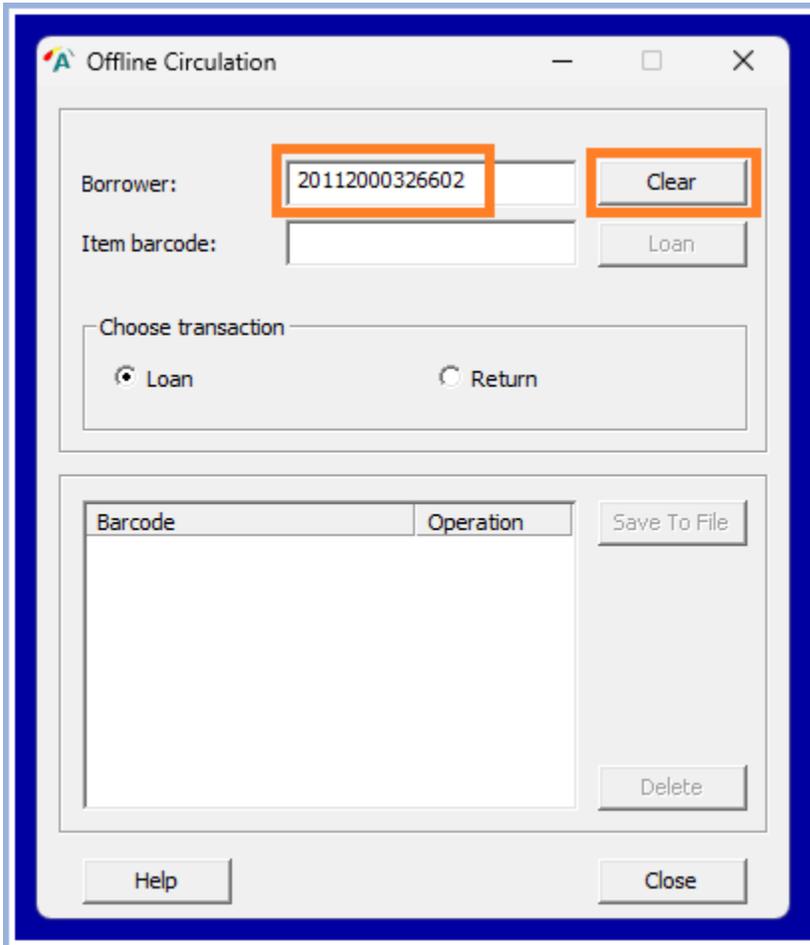
6. Once the data has been saved and the information has been cleared, everything is ready for you to assist the next patron.

Uploading the Offline Circulation File into Alma

1. Once the online version of Alma is available again, the data file(s) from the transactions in Alma Offline Circulation will need to be uploaded into Alma and then deleted from the computer. This can be done by any staff person with the appropriate permissions in Alma, whether or not they used the program while Alma was unavailable.
   Note: If Alma Offline Circulation was used on multiple computers, *each* computer that was used for transactions will have a data file to be uploaded.

2. In Alma, open the Fulfillment menu and click on "Offline Circulation" under the "Advanced Tools – Loans" heading.
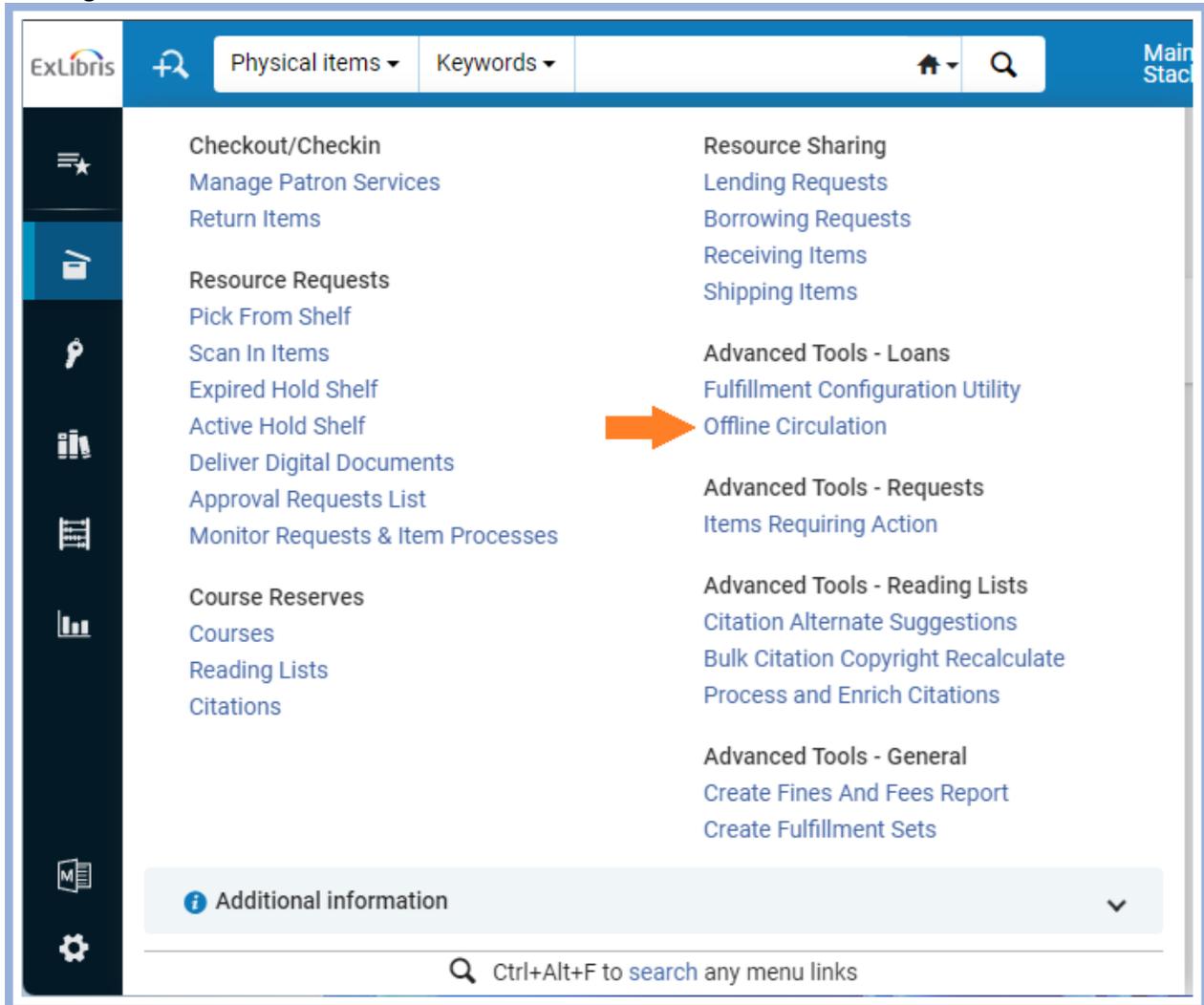
3. From the Offline Circulation screen, go to the "File name" field and click the button to the right of that field that has an icon of a file folder.
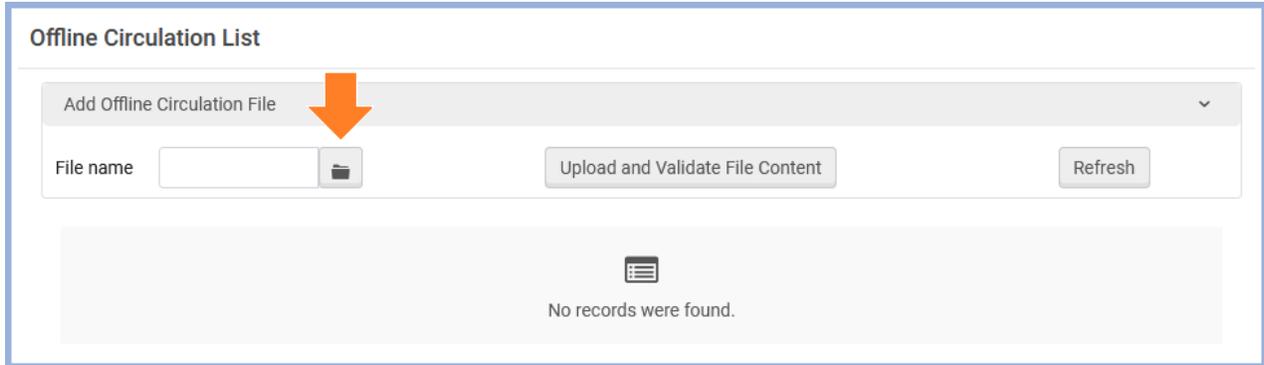
4. In the File Upload window that pops up, open the computer's C: drive. (You may need to scroll down to "This PC" in the left sidebar to bring it up.)
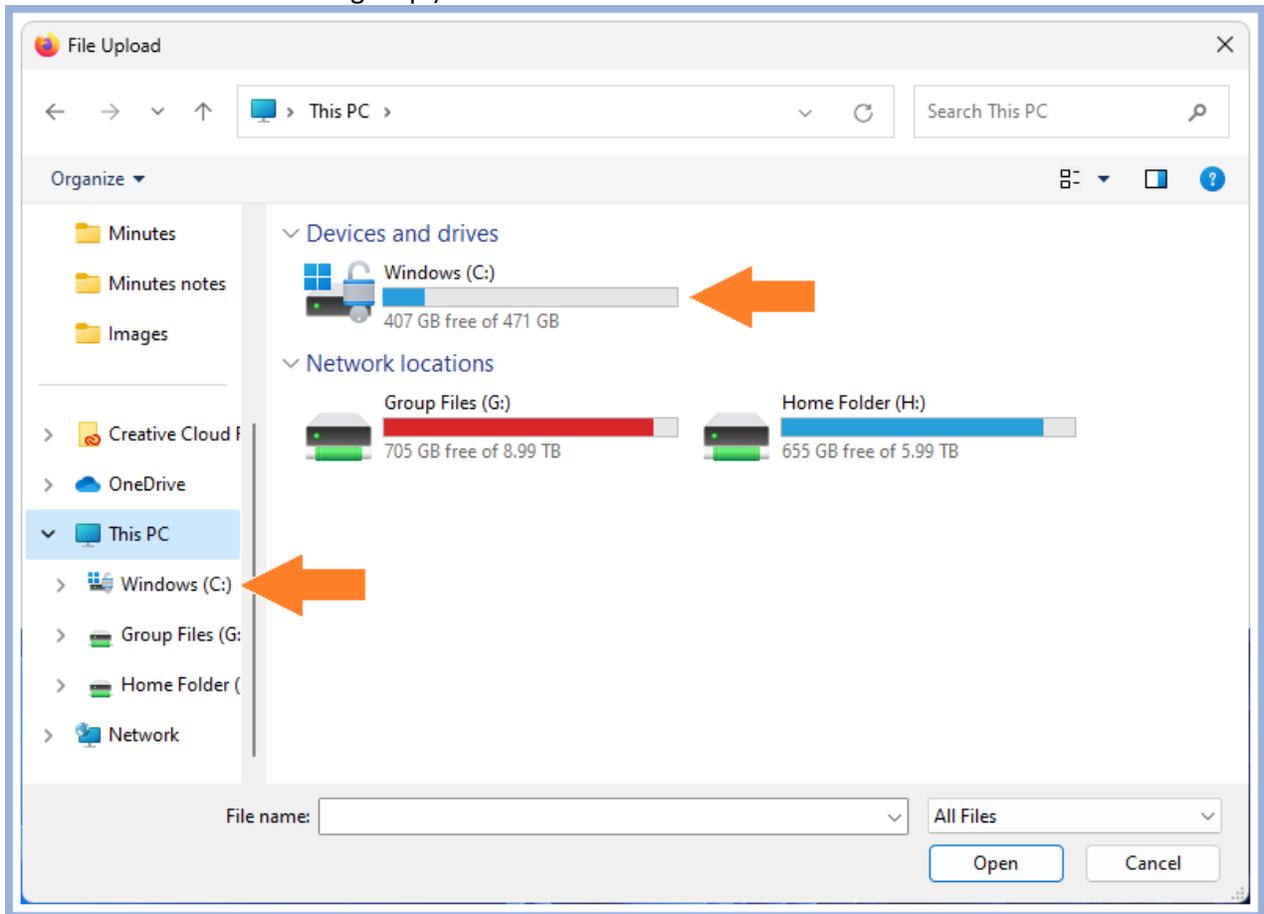
5. From the C: drive:
   a. Open the "Alma Offline Circulation" folder.
   b. Then open the "OffCirc" folder.
   c. Then open the "files" folder.
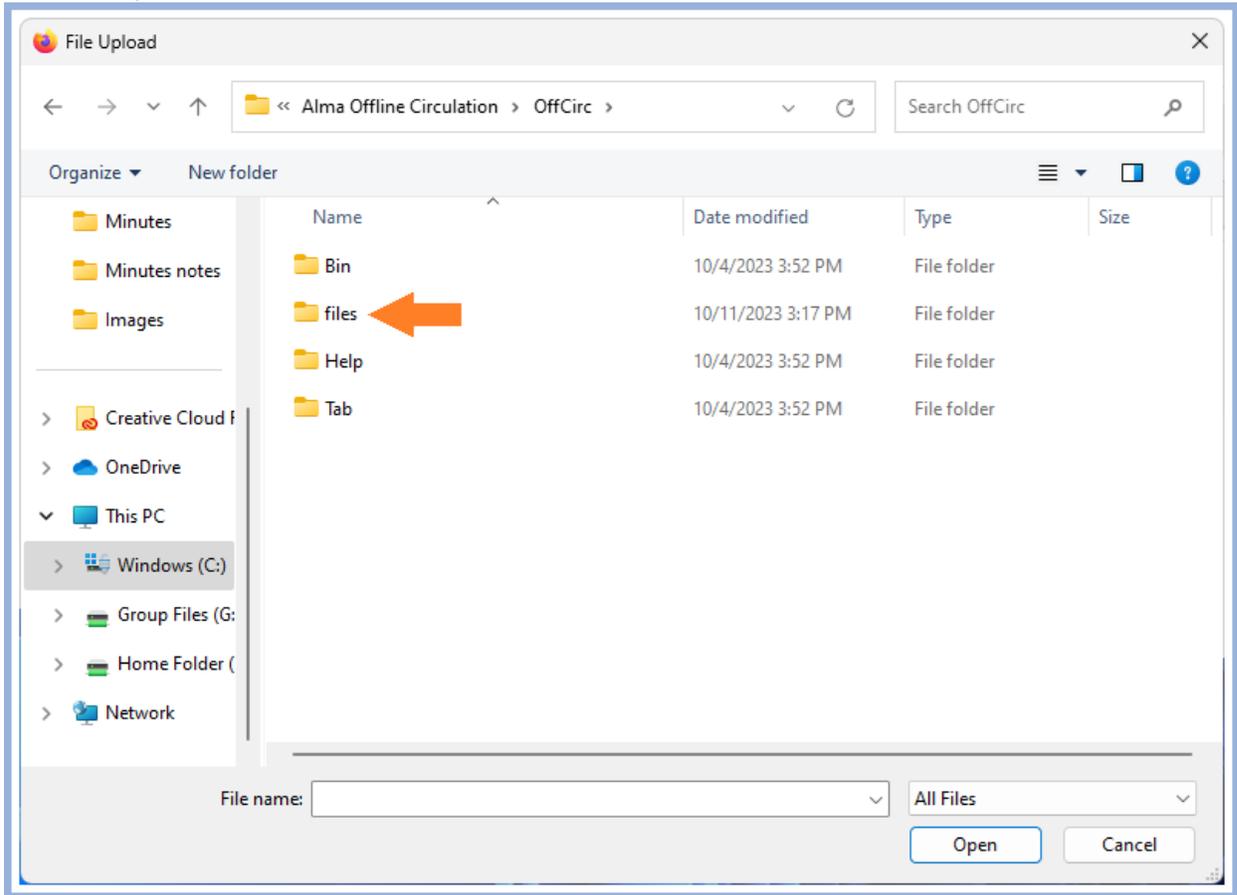
6. From the "files" folder, open the "OffCirc.dat" data file.
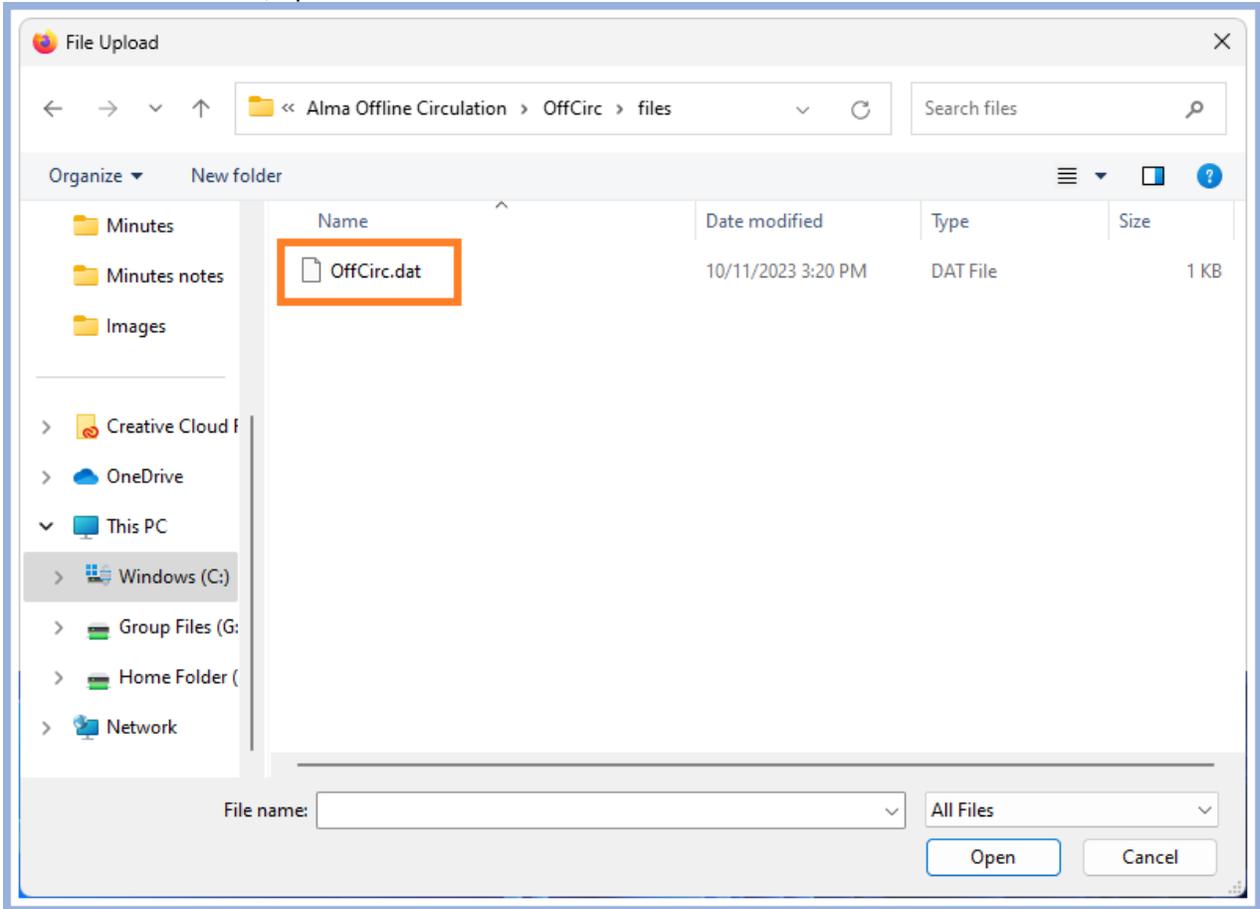
7. This will return you to the Alma screen, which now has the OffCirc.dat file. Click the "Upload and Validate File Content" button.
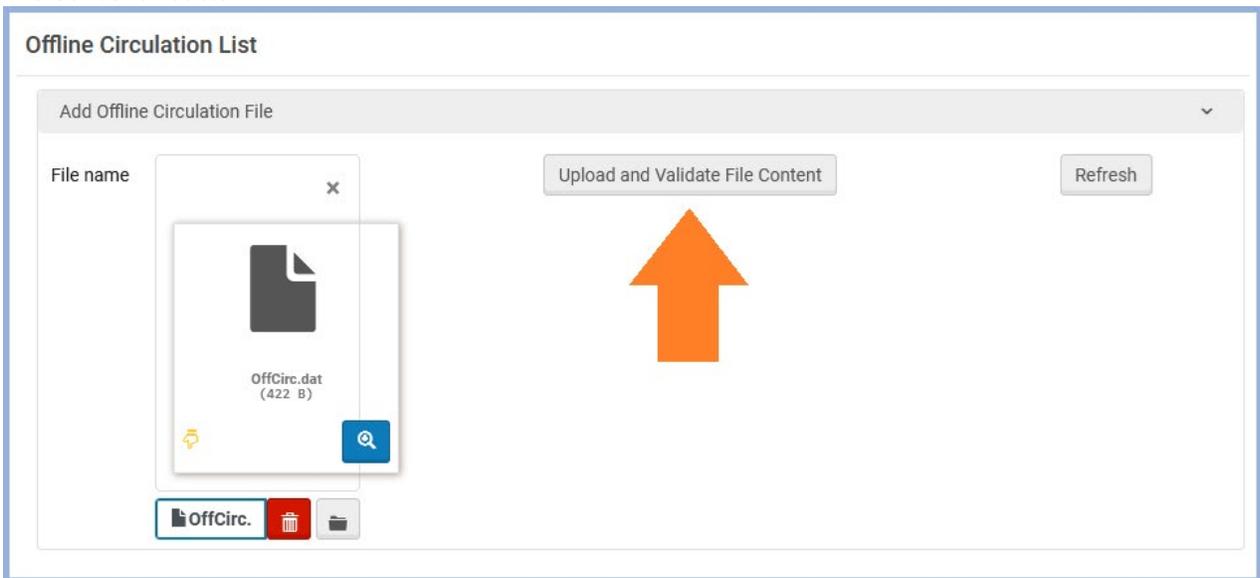
8. The screen will show that the status is pending. You can click the "Refresh" button to update the status. It may give the status as "Running" for a little while.
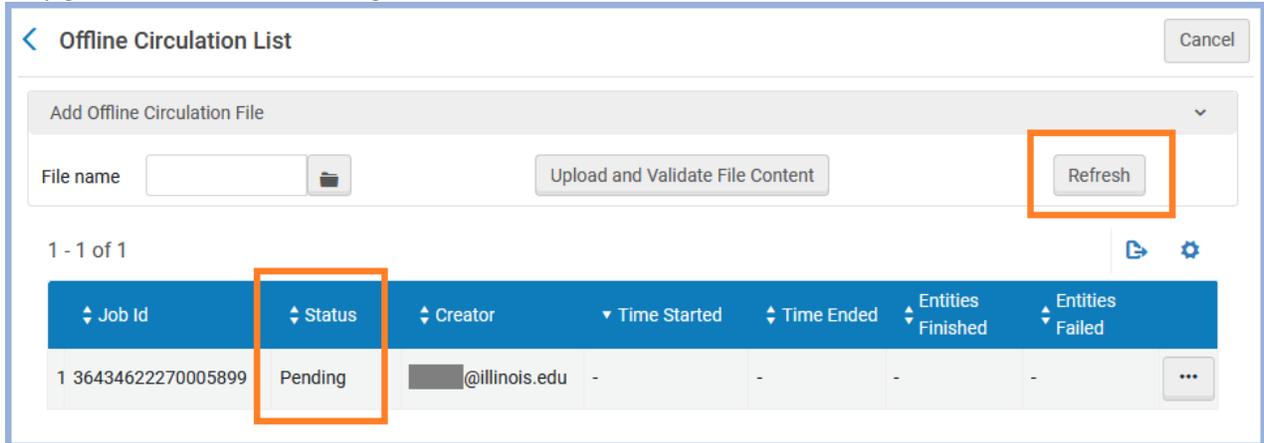
9. Once the file has been fully uploaded and processed, the status will change to "Completed Successfully", and you will receive an automated email saying that it was uploaded.
Note: Although the loans have now been processed (unless there were errors; see below for details), the patrons will not receive an automated Loan Receipt email.
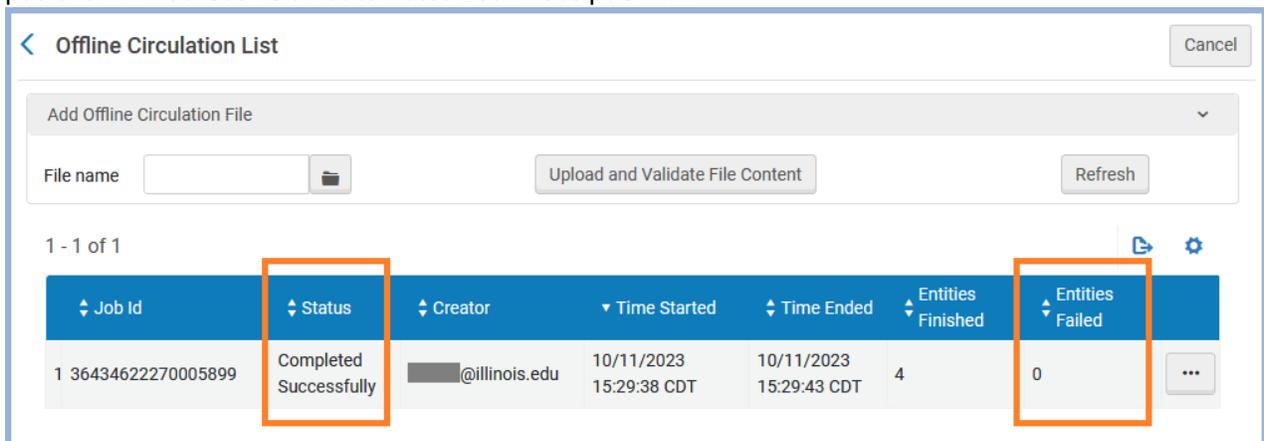
10. Next, we'll need to check for errors. Check the "Entities Failed" column.
    a. If it's 0, go directly to the Deleting the Offline Circulation File section.
    b. If it's more than 0, go to the Checking the Data in the Offline Circulation File section before you delete the file.

Checking the Data in the Offline Circulation File

1. If the "Offline Circulation List" page where you uploaded the Offline Circulation File in Alma shows anything greater than 0 in the "Entities Failed" column, click the "…" button on the right side for a drop-down menu. Then select "View Report" to see the Job Report.

2. The Job Report will show the total number of records processed and the number of records with exceptions (which indicates that they had an issue that caused them not to process as expected). If there were any records with exceptions, the Report Table will give additional details, including which line of the data file has the error. See the Error Explanations section below for additional information.

3. You can also view the Job Report by checking the automated email notification you received when you uploaded the file.

Loans - Upload offline transactions - Completed Successfully

C circlib@library.illinois.edu
To: ▓▓▓▓▓▓

Wed 1/3/2024 2:48 PM

The job that you recently initiated in Alma is now complete:

Job Report

Process ID	40052851600005899	**Name**	Loans - Upload offline transactions
Started on	01/03/2024 14:48:47 CST	**Finished on**	01/03/2024 14:48:47 CST
Total run time	0.294 Seconds	**Created by**	▓▓▓▓@illinois.edu
Status	Completed Successfully	**Status date**	01/03/2024 14:48:47 CST
Records processed	3	**Records with exceptions**	3

Report Table

Line	Error Message
1	Item not found. Barcode: 9780399581991
2	User not found. Barcode: 20112000204247
3	A later action on this item happened. Barcode: 30112040496314 Item Title: Science and skiing / edited by E. Müller [and others].
3	A later action on this item happened. Barcode: 30112040496314 Item Title: Science and skiing / edited by E. Müller [and others].

4. For additional details about the transactions with errors, check the Offline Circulation File. To start with, open File Explorer and go to the C: Drive. Then open the "Alma Offline Circulation" folder, and then the "OffCirc" folder, and then the "files" folder.
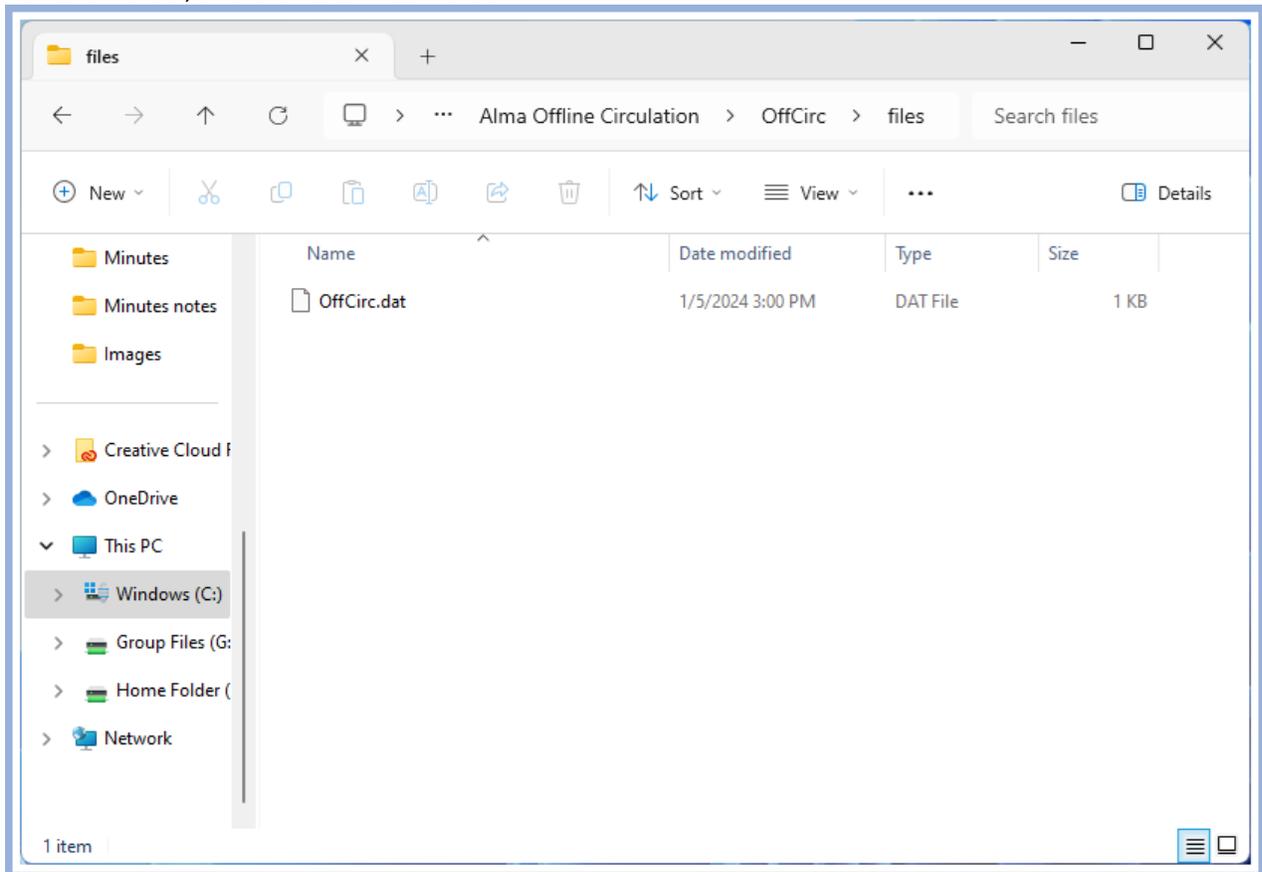
5. From the "files" folder, click on the "OffCirc.dat" data file to select it. Then right-click it to bring up a menu, and select "Open with". If it gives the option of Notepad or Notepad++, select one of those.
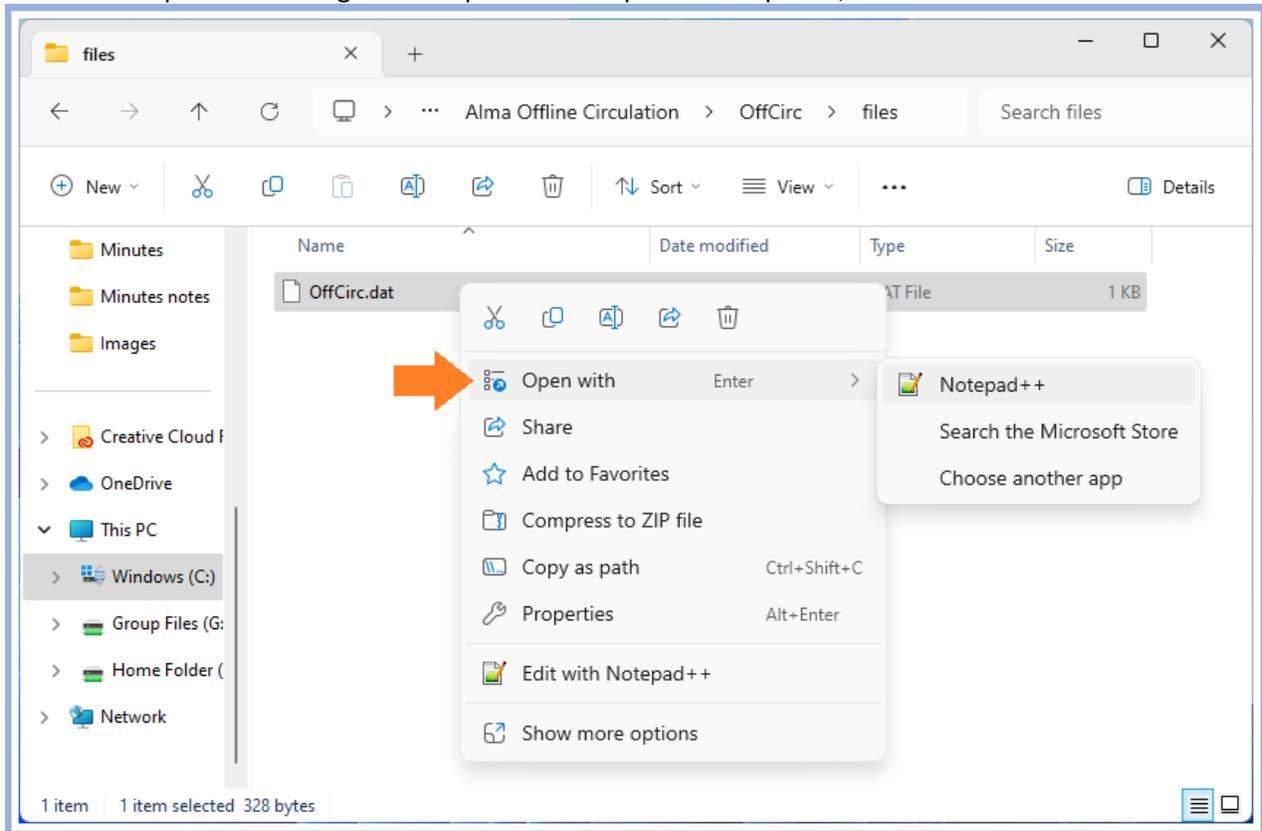
6. If Notepad or Notepad++ is not available from the menu, click "Choose another app" to bring up another menu with more programs to choose from. Viewing the file is simplest with a Notepad program, but other programs such as Word and Excel will also work.
Note: You may need to click "Choose an app on your PC" to find a program that will work.
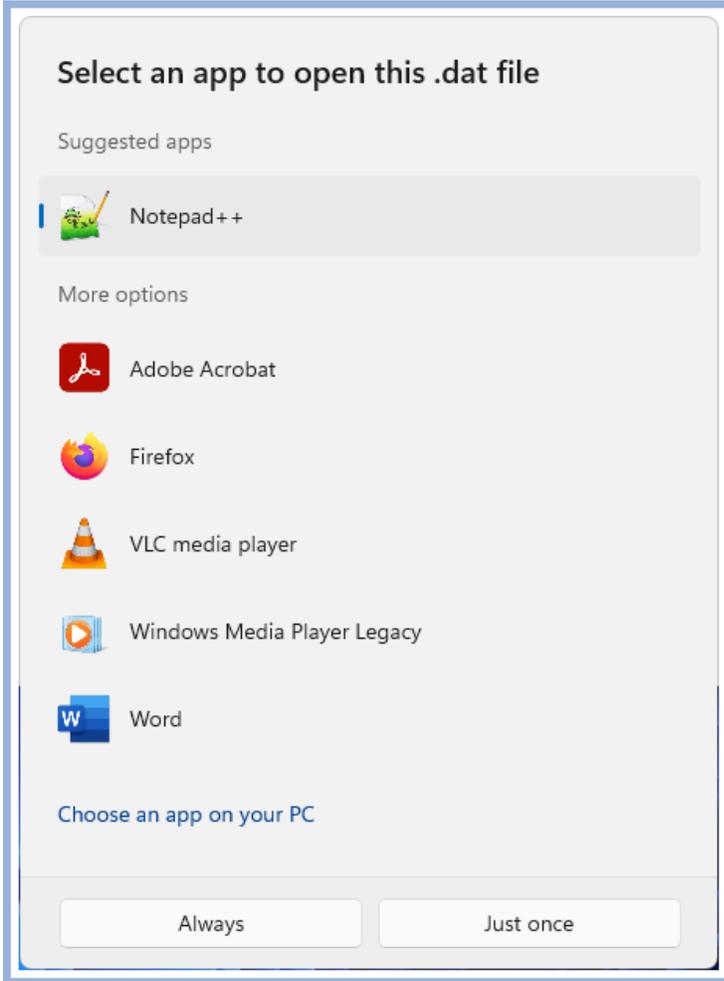
7. The file will pop up. You may need to enlarge the window to view all of it.
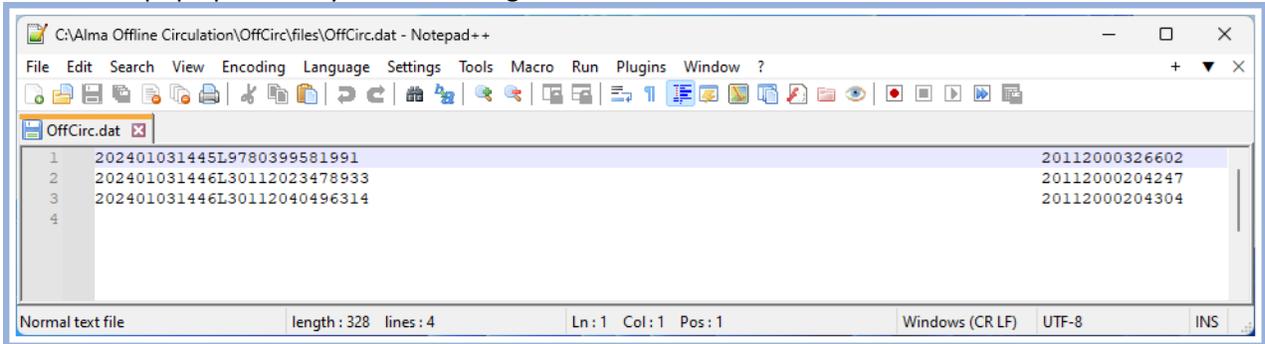
8. The file has the following information about each transaction:
   a. The date and time the transaction took place, in the format of YYYYMMDDHHMM (year, month, day, hour, minute).
   b. Whether it was a loan or a return (signified by an L or an R).
   c. The item's barcode.
   d. Separately, the borrower's barcode (if it was a loan).
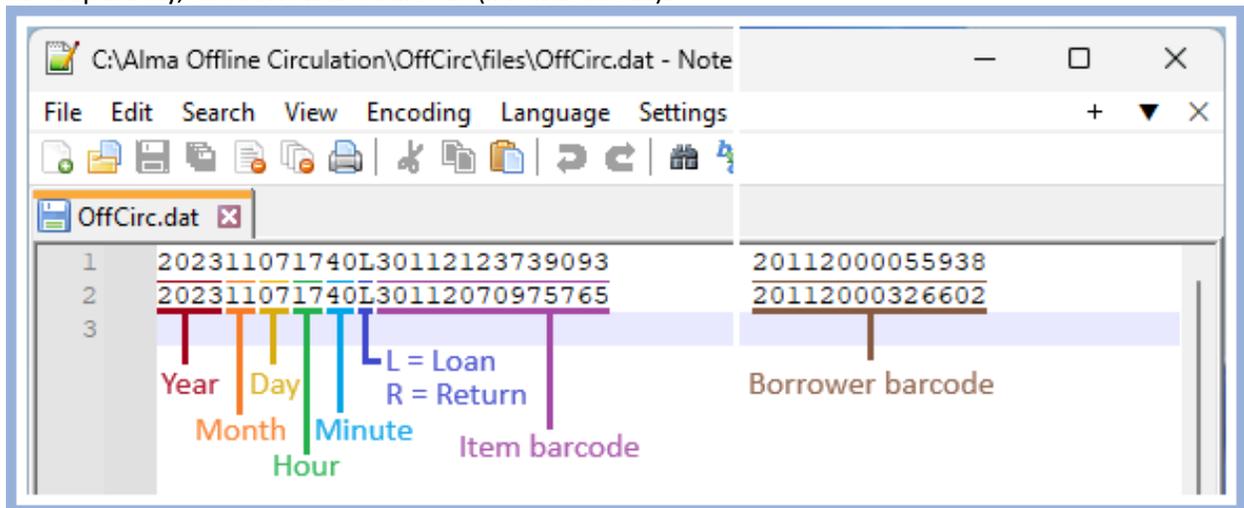
9. This data can be used to help fix issues with the uploaded transactions. The Error Explanations section below has more details about what the error messages mean and options for addressing them.

10. Once any errors have been addressed as needed, close the file and then go to the Deleting the Offline Circulation File section.

Error Explanations

1. **Item not found.**
   a. This means that the item's barcode in the data file doesn't match with an item in Alma. This may have been due to a partial scan or scanning the wrong barcode. Check with your supervisor for your unit's policy on what to do in this situation.
   b. In the example error above (Item not found. Barcode: 9780399581991), the ISBN was scanned instead of the item's barcode. This can be used in Alma to narrow down which item it might be.
   c. The error report will not show the borrower's barcode. To find that, check the offline circulation file (see instructions above).

2. **User not found.**
   a. This means that the borrower's barcode doesn't match with any patron's current barcode in Alma. The most common reason for this is if a patron gives you an older i-card that is no longer valid because they have a newer one.
   b. Contact Central Access Services with the barcode you have so they can look up the patron and their current barcode.
   c. The error report will not show the item's barcode. To find that, check the offline circulation file (see instructions above).

3. **A later action on this item happened.**
   a. This means that something has been done in Alma with the item since the offline transaction, so the offline transaction was not processed. Most commonly, this happens because the item was returned in the online version of Alma before the offline data file was uploaded.
      Note: This error generally appears twice on the Report Table.
   b. This error doesn't require any action from us.

Once any errors have been addressed (if necessary), go to the Deleting the Offline Circulation File section.

Deleting the Offline Circulation File

After you have uploaded the file to the regular Alma program and checked to fix any errors, **you must delete the OffCirc file**. If you don't delete it, then the next time Alma Offline is used on that computer, all the old data will remain on the same file that the new data is being added to. When that file is uploaded, the old transactions may happen again, which could lead to a situation where an item that was previously checked out and then returned is erroneously checked back out to the patron.

Note: If Alma Offline Circulation was used on multiple computers, *each* computer that was used for transactions will have a data file to be deleted.

1. If you have the file open, close out of it.

2. Open File Explorer and go to the C: Drive. Then open the "Alma Offline Circulation" folder, and then the "OffCirc" folder, and then the "files" folder.
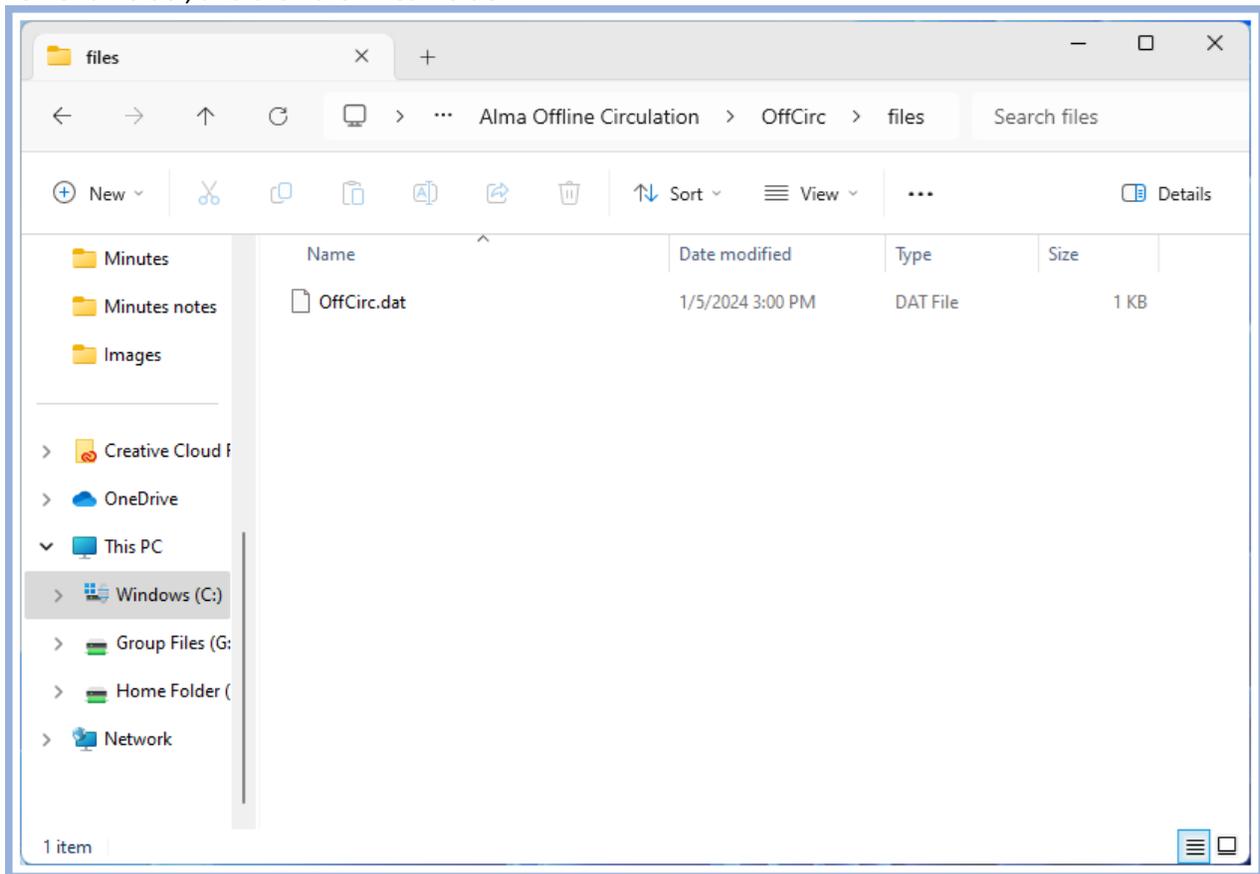
3. Click on the "OffCirc.dat" file to select it. Then delete the file in one of the following ways:
   a. Press the "Delete" key on your keyboard, or…
   b. Right-click the file to bring up a menu, and then click "Delete" option or the trash can icon (depending on which version of Windows you're using).
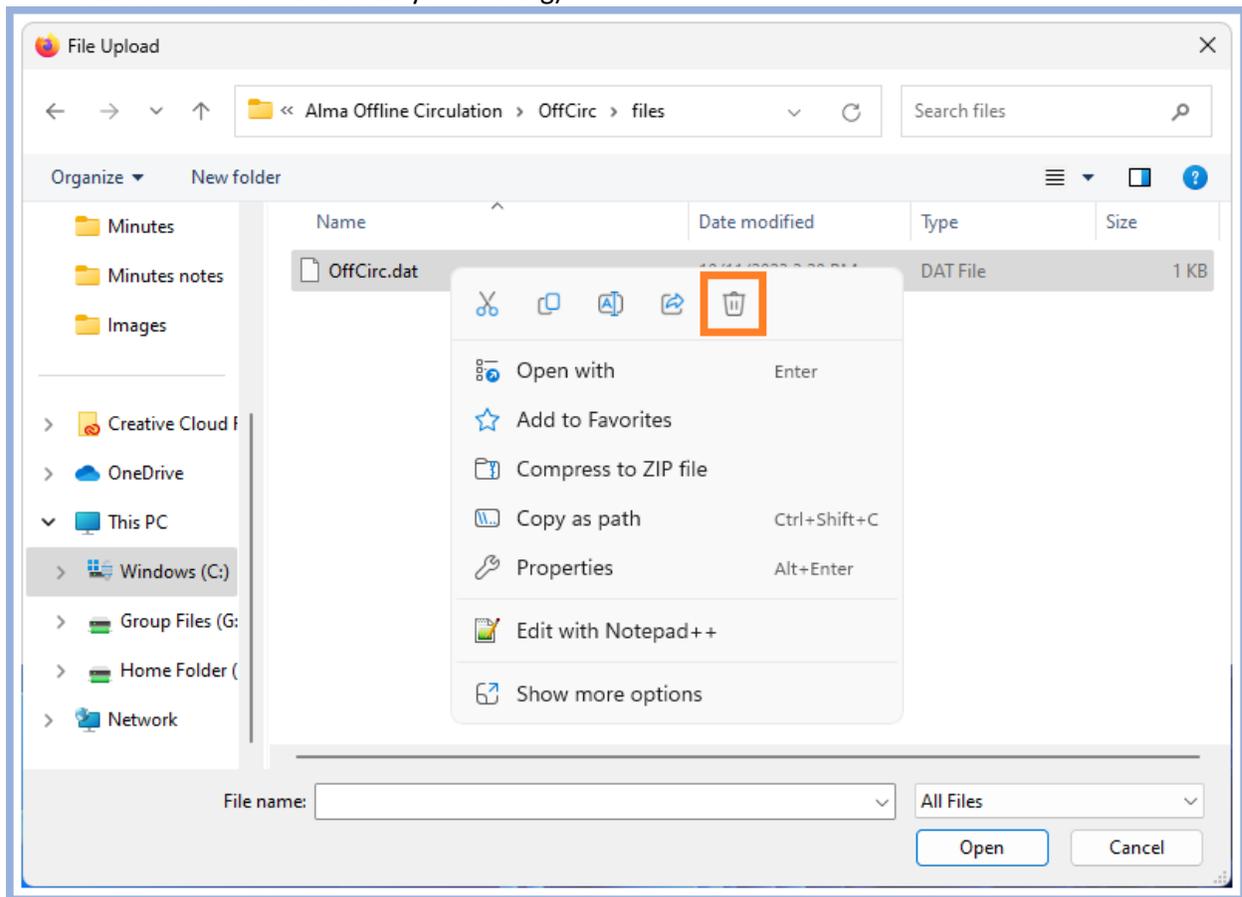
Appendix: Time-Out Function

Alma Offline Circulation has a time-out function that activates if you start a transaction and then don't enter any information for one minute (for instance, while you're answering a patron's question).

1. If you scan in the borrower's barcode and then don't touch anything for a minute, the barcode will vanish. There will not be any sort of notification pop-up. If this happens, just ask to see the borrower's card and scan it in again.

2. If you've scanned in the borrower's barcode and then scanned in at least one item, and then you don't touch anything for a minute, a pop-up appears and asks, "Do you want to save data?" This pop-up is only there for 10 seconds before it vanishes, so it's possible to miss it entirely.
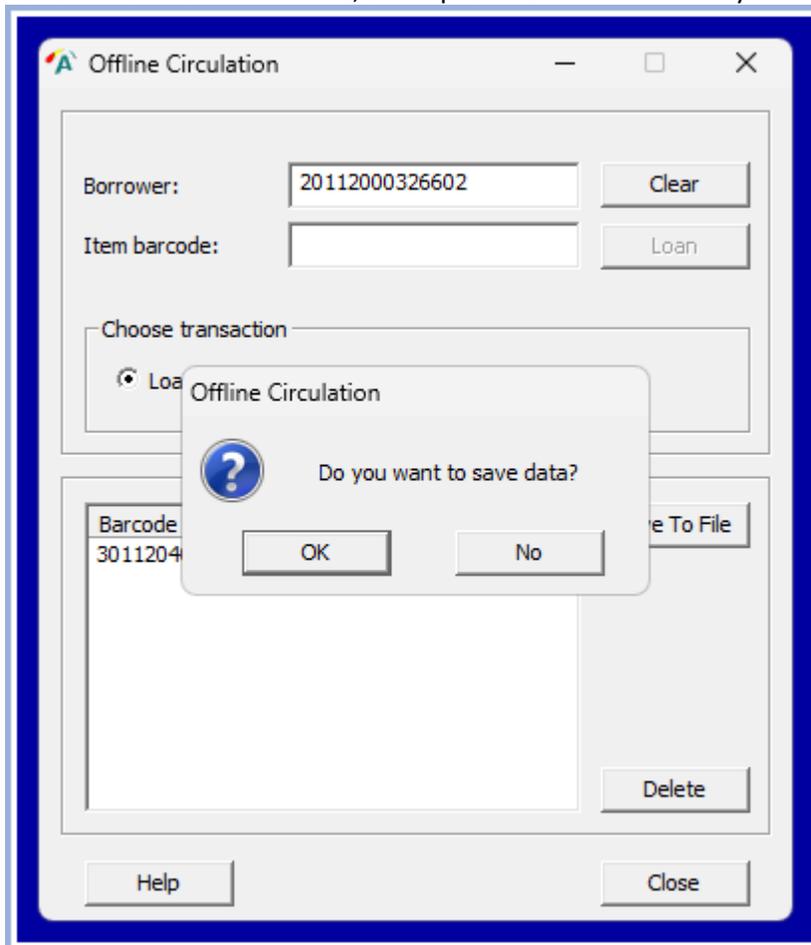
   a. If you click "OK", the data will be saved the same way as if you had clicked the "Save to File" button. Note that this also means that the item's barcode will vanish, but the borrower's barcode will remain (unless you don't touch anything for another minute; at that point, the borrower's barcode will also vanish).
   b. If you click "No", both the borrower's barcode and the item's barcode will remain on the screen. In this case, the data hasn't been saved, and you will need to click the "Save to File" button when you're done with the transaction.
   c. If you don't select a response within 10 seconds after the pop-up appears, **the pop-up vanishes** and it's treated the same way as if you had clicked "OK". The item's barcode vanishes, and the data is saved the same way as if you had clicked the "Save to File" button. The borrower's barcode will remain in place unless you don't touch anything for another minute, at which time it will vanish.

3. If you're loaning something to a patron and the information you scanned into the program vanished and you're not sure what happened, it's fine to just scan it in again to make sure it was loaned correctly. It may not be necessary, but it won't hurt anything.