

Procedure for Using Millennium Offline Circulation Module

Millennium Offline Circulation (MOC) is a PC-based application that enables libraries to continue with limited automated circulation functions: checkout, checkin, renewal, and patron registration. MOC may be used simultaneously on multiple PCs within the library.

The MOC application and the information from these functions are stored on the PC's harddrive in the C:\\Millennium\\ folder. If you are experiencing extensive downtime on your network, you may want to backup the files periodically.

NOTE: When you begin a MOC session, you must notify the MCO Helpdesk and the other members of your cluster.

Set Up for Millennium Offline Circulation

1. Download and install the appropriate version (**offline141.exe**) for Rel.2002 Phase 3 from CSDirect.
2. In MOC, from the **View** menu, select **Preferences**. MOC displays the Preferences dialog:
 - Enter your library's **circulation statistics group number**.
 - Enter the date format **mdy**.
 - Uncheck the barcode validity check. It will not work properly on a multi-library system.
 - In the **Patron Registration Settings** table, enter the corresponding Innovative tag in the Tag column for each patron field for which you want to be prompted during patron registration. MOC automatically generates prompts for the following tags (italized tags should be required by all):

Tag	Prompt
0	<i>P TYPE</i>
1	PCODE1
2	PCODE2
3	PCODE3
4	<i>Home Library</i>
5	Patron Message
6	Manual Block
7	<i>Expiration Date</i>
a	<i>Address</i>
b	<i>Barcode</i>
h	Address 2
n	<i>Name</i>
p	Phone 2
t	<i>Phone</i>

In addition, the following tags and prompts should also be entered:

d	<i>Dept</i>
u	<i>Unique ID</i>

In the Default column enter any default text such as a default patron type, or "Offline Patron" in the Patron message. Millennium Offline Circulation does not accept defaults for "Name," "Telephone 2," or "Telephone." If you enter a default for Barcode, when you create a new patron record, you can add to the default, but cannot modify it.

After you enter a tag and its corresponding prompt or default, press **Enter** or select another row in the Patron Registrations Table. MOC does not register entries until you remove focus from their row. MOC automatically lowercases any uppercase tags that you enter.

To write your changes to the **pccirc.cfg** file, choose the Apply button. Note that the system will not retain your changes unless you chose the Apply button.

Choose the **Quit** button or close the window to exit the Preferences dialog.

To ensure that all of the library's PCs are configured with the same Offline Circulation settings, you may copy the **pccirc.cfg** file to a disk or network. Before copying the file, make sure that MOC is not running. The default directory for the pccirc.cfg file is **c:\Millennium**.

Checking Out Items

1. Start MOC and change to MOC's **Check-Out** mode.
2. MOC prompts you to enter the patron's barcode. **Key or scan** the patron's barcode and press **Enter**.
3. MOC prompts you to enter the due date for the items that you will check out to the patron. **Key** the due date in the format specified in the Preferences dialog and press **Enter**.
4. MOC asks you whether it should use an hourly loan rule for the items that you will check out to the patron. **Key 'Y' or 'N'** to indicate whether you want to use an hourly loan rule and press **Enter**. If you keyed 'Y,' MOC prompts you to enter the time the item is due. Key a whole number from **0 to 23** (military time) and press **Enter**.
5. MOC prompts you to enter the barcode for each item that you are checking out to the patron. **Key or scan** the item barcode and press **Enter**. MOC records each check-out in the **circ.dat** circulation file.
 - Continue to scan item barcodes for the same patron if there no change in the due date is required. If a change in the due date is required, go to step 6 and procede as if there is a new patron.
6. When all items have been checked out to the patron, choose the **Clear Patron** button. MOC prompts you to enter the next patron's barcode.

Checking In Items

1. Change to the **Check-In** mode.
2. MOC prompts you to enter the item's barcode. **Key or scan** the item's barcode and press **Enter**.
3. Continue entering item barcodes. MOC writes each check-in to the **circ.dat** file. Using the **Clear** button does not erase the transactions from the circ.dat file.

Renewing Items

1. Change to the **Renew** mode
2. MOC prompts you to enter the patron's barcode. **Key or scan** the patron's barcode and press **Enter**.
3. MOC prompts you to enter the due date for the items that you are renewing. **Key** the due date in the format specified in the Preferences dialog and press Enter.
4. MOC asks you whether it should use an hourly loan rule for the renewals. **Key 'Y' or 'N'** to indicate whether you want to use an hourly loan rule and press **Enter**. If you keyed 'Y,' MOC prompts you to enter the time the item is due. Key a whole number from **0 to 23** (military time) and press **Enter**.
5. MOC prompts you to enter the barcode for each item that you are renewing for the patron. **Key or scan** the each item barcode and press **Enter**.
6. After renewing all of a patron's items, choose the **Clear Patron** button.

Creating Patron Records

1. Change to the **Patron Registration** mode.
2. The Patron Registration mode displays all the prompts and defaults that you entered in the Preferences dialog
3. **Key** the relevant patron information in each field. If necessary, you can leave fields blank.
4. To edit a field, place the cursor in the field and begin typing. To clear all of the data that you entered, choose the **Clear Patron Registration Settings** button. To save the data that you entered, choose the **Add** button. MOC records the patron's information in the **patron.dat** file and resets the fields.
5. To create another patron, repeat Step 2. There is no limit to the number of patrons you can register offline. However, uploading the data regularly will ensure that your database is up to date.

Uploading Transactions

1. Check that the server is running. Test this by starting Millennium Circulation and logging in; you will not be able to log in if the server is not available.
2. Open MOC. From the **File** menu, choose the **Upload circulation and patron data** option.
3. MOC prompts you to check that the server can accept data. If you were able to log into Millennium Circulation in step 1, choose **Yes**.
4. MOC connects to the server and uploads the PC's **patron.dat** and **circ.dat** files to the character-based system. When it is finished, MOC displays the number of uploaded circulation transactions and patron registrations.
5. Erase the files on the PC so that the same information cannot be uploaded again. MOC prompts you to erase the files after uploading them. You can also erase the files using the **File | Erase circulation transactions** or **File | Erase patron transactions** command.

NOTE: You should not erase **patron.dat** or **circ.dat** until you have verified the data was correctly uploaded to your cluster server. It may also be prudent to copy the files from **C:\\Millennium** to another folder before erasing them.

6. From the **ADDITIONAL CIRCULATION FUNCTIONS** menu on the character-based system, select the **Process PC transactions | GET patron registration data** from PC options to process the **patron.dat** file.

NOTE: The patron file **must** be loaded before the circulation transactions file.

- Select Step 1 (**Convert PC recs to MARC(patron) format**). This will convert the **patron.dat** file to a new MARC file named **patron.pat**.
 - The **patron.pat** file may be viewed by selecting **VIEW a MARC file**.
 - Once the file has been converted to MARC format, select the option Step 2 (**Load MARC(patron) recs into INNOPAC database**).
 - After you confirm that the files were loaded, **REMOVE** both the .dat and .pat files.
7. From the **ADDITIONAL CIRCULATION FUNCTIONS** menu on the character-based system, select the **Process PC transactions** to process the **circ.dat** file.
 - Select **Fines will be assessed**. When selected, the menu will display the other option, Fines will NOT be assessed.
 - Select **Holds will be automatically processed**. When selected, the menu will display the other option, Holds will NOT be automatically processed.

NOTE: These two menu options are toggles. The menu will display the choice NOT selected and the action NOT chosen.
 - Select the **Process transferred CIRC transactions** command to process the **circ.dat** file on the character-based system.
 - When the transfer is complete, you will be returned to the Process PC Transactions menu.

8. Select **VIEW messages from processed CIRC transactions** and print the messages. The message will identify errors which may need to be corrected and other information which may require attention.