PROCESSING OFFLINE TRANSACTIONS

1. When you go to the Evergreen login page, it will show "Unprocessed offline transactions waiting for upload". **You will need to do these steps on each circulation station.**
2. Sign in and go to the Circulation dropdown and click on "Offline Circulation". In the "Sessions Management" tab, you will see "Pending Transactions" and "Offline Transactions". When you open "Pending Transactions", you will see all the transactions for that station.
3. **DO NOT click on "Clear Transactions".** This will cause every offline transaction to be deleted.
4. Click on "Offline Transactions" and then on "Create Session".
5. Enter a name for the session (at **APL**, it will be: YYYYMMDD-APLMN1 {2 or 3}). Next Click on "OK/Continue" to proceed.
6. Your new session will be at the top of the list. Click "Upload" to upload all the pending transactions. When all are uploaded, the "Upload Count" column will update to show the number of uploaded transactions.
7. Click "Process" to process the transactions.
8. Click "Refresh" to see the progress.
9. When all transactions are processed. The "Date Completed" column will be updated.
10. Scroll to the bottom of the screen to see if there are entries in "Exceptions List'. Some may require staff to follow up.

EXCEPTIONS

Exceptions are problems that were encountered during processing. For example, a mis-scanned patron barcode, an open circulation, or an item that was not checked in before it was checked out to another patron would all be listed as exceptions. Those transactions causing exceptions might not be loaded into the Evergreen database. Staff should examine the exceptions and take necessary action.

These are a few notes about possible exceptions. It is not an all-inclusive list.

•   Checking out an item with the wrong date (i.e. the Offline Checkout date is +2 weeks and the item's regular circulation period is +1 week) does not cause an exception.
•   Overdue books are not flagged as exceptions.
•   Checking out a reference book or another item set to not circulate does not cause an exception.
•   Checking out an item belonging to another library does not cause an exception.
•   An item that is targeted for a patron hold and captured via offline checkin will not cause an exception unless that item also goes to an In-Transit status.
•   An item that is on hold for Patron A but checked out to Patron B will not cause an exception. Patron A's hold will be reset and will retarget the next time the hold targeter is run. In order to avoid this, it is recommended to not check out holds to other patrons.
•   If you check out a book to a patron using a previous barcode for that patron, it will cause an exception and you will have to retrieve that patron while online and re-enter the item barcode in order to check out the item.

Exception List

Workstation	Type	Timestamp	Event Name	Patron Barcode	Item Barcode	Non-cataloged Type	Checkout Date	Due Date	Checkin Date	
APEX-abn	checkout	7/25/17 4:23 PM	COPY_IN_TRANSIT	23859000060659	csharptesting		7/25/17 4:23 PM	7/31/17		Item Patron Debug
APEX-abn	checkout	7/25/17 4:23 PM	OPEN_CIRCULATION_EXISTS	23859000060659	jhkjhjhjkh		7/25/17 4:23 PM	7/31/17		Item Patron Debug
APEX-abn	checkout	7/25/17 4:24 PM	PATRON_ACCOUNT_EXPIRED	387826	878787		7/25/17 4:24 PM	7/31/17		Item Patron Debug

At the right side of each exception are buttons for **Item**, **Patron**, and **Debug**. Clicking the **Item** button will retrieve the associated item in a new browser window. Clicking on the **Patron** button will retrieve the associated patron in a new browser window. Clicking the **Debug** button will result in a modal with detailed debugging information.

Common event names in the Exceptions List include:

- ROUTE-ITEM - Indicates the book should be routed to another branch or library system. You'll need to find the book and re-check it in while online to get the Transit Slip to print.
- COPY_STATUS_LOST - Indicates a book previously marked as lost was found and checked in. You will need to find the book and re-check it in while online to correctly clear it from the patron's account.
- CIRC_CLAIMS_RETURNED - Indicates a book previously marked as claimed-returned was found and checked in. You will need to find the book and re-check it in while online to correctly clear it from the patron's account.
- ASSET_COPY_NOT_FOUND - Indicates the item barcode was mis-scanned/mis-typed.
- ACTOR_CARD_NOT_FOUND - Indicates the patron's library barcode was mis-scanned, mis-typed, or nonexistent.
- OPEN_CIRCULATION_EXISTS - Indicates a book was checked out that had never been checked in.
- MAX_RENEWALS_REACHED - Indicates the item has already been renewed the maximum times allowed. Note that if the staff member processing the offline transaction set has the MAX_RENEWALS_REACHED override permission at the appropriate level, the system will automatically override the error and will allow the renewal.

Information for Processing Offline Transactions has come from: http://docs.evergreen-ils.org/reorg/3.2/circulation.

Put together for APL & LLC by Mardi Hochstetler.