USING OFF-LINE CIRCULATION

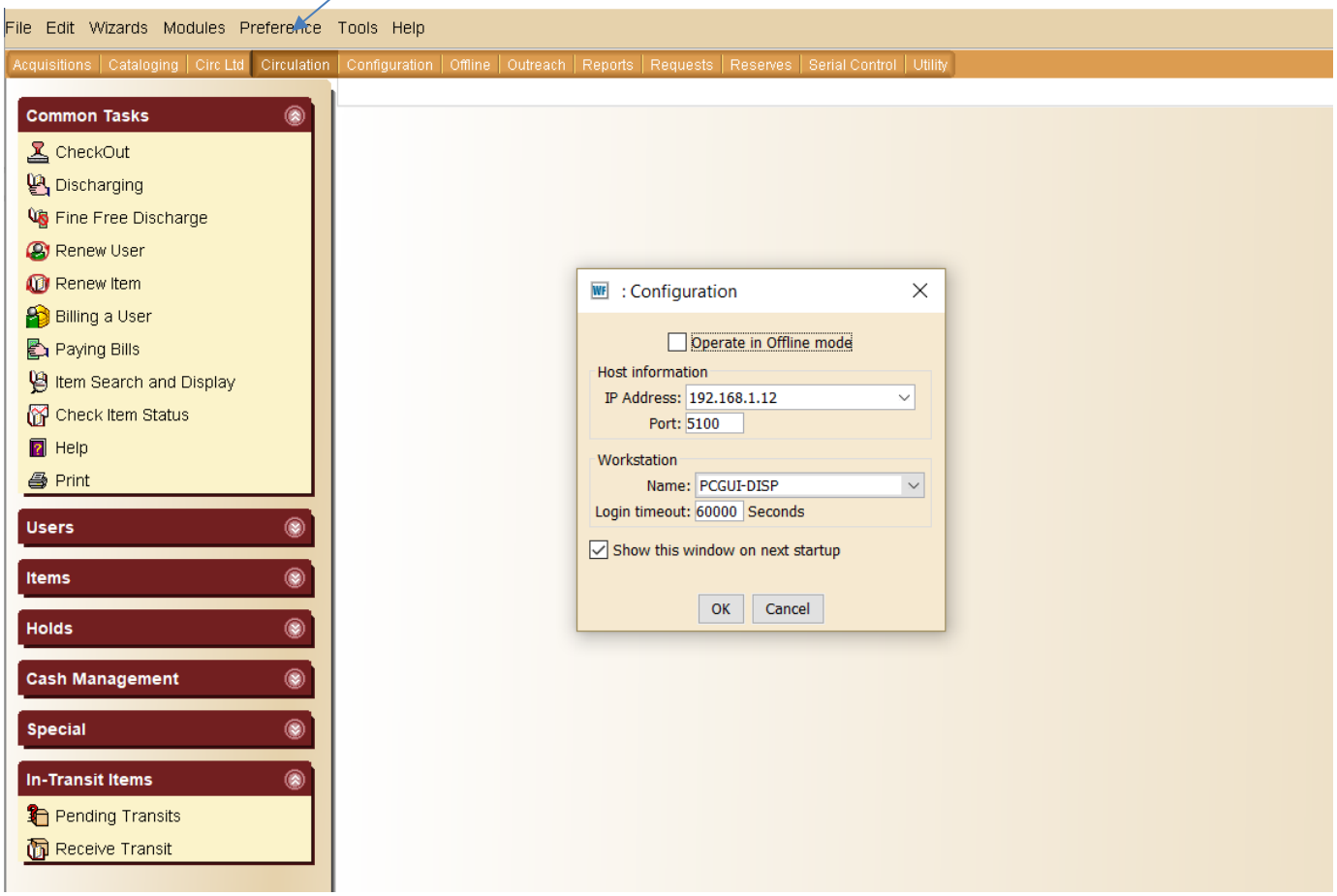
We are recommend that libraries use the Off-Line circulation function that is built into Workflows for check-out only. Here are some important things to know about this before you begin:

1. Off-line circulation should only be used for checkouts. It cannot be used for checking items in, putting items in transit, patron registration, bill payment, renewals, or placing holds.
2. Patrons must have their library card with them while the system is off-line. You won't be able to look up someone by name and you can't check out an item in off-line mode by name.
3. Receipt printers won't work. Because you won't actually be accessing the system you would only be giving the patron a list of barcodes without the items real due date.

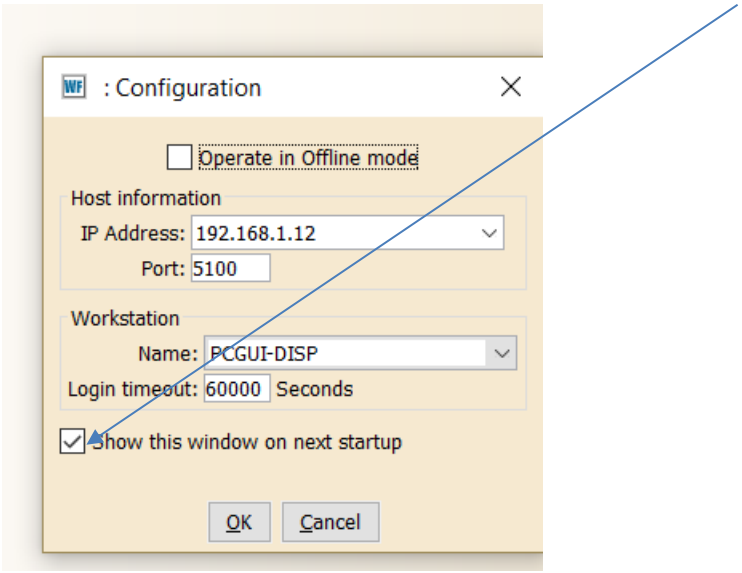
OFFLINE CIRCULATION SET-UP

Must Be Completed Before Downtime

In order to use workflows in off-line mode you have to be able to view the Configuration Screen at log-in. Many libraries have that view turned off because staff members have been known to type over the SAILS IP address when they log-in. Click on Preference

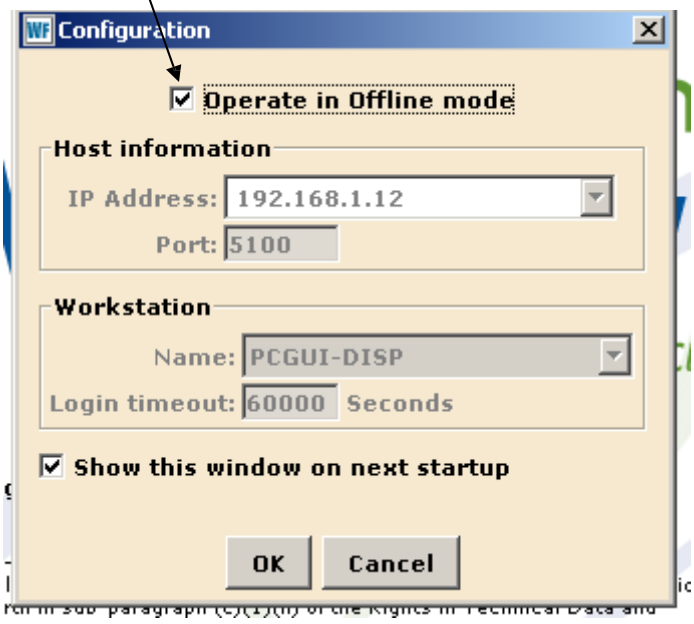


Then click on Configuration and make sure the sure the Show this Window on next startup is checked

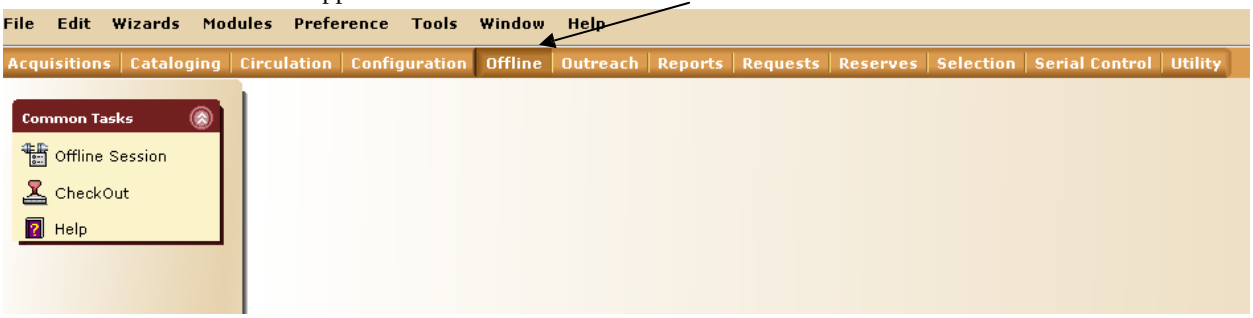


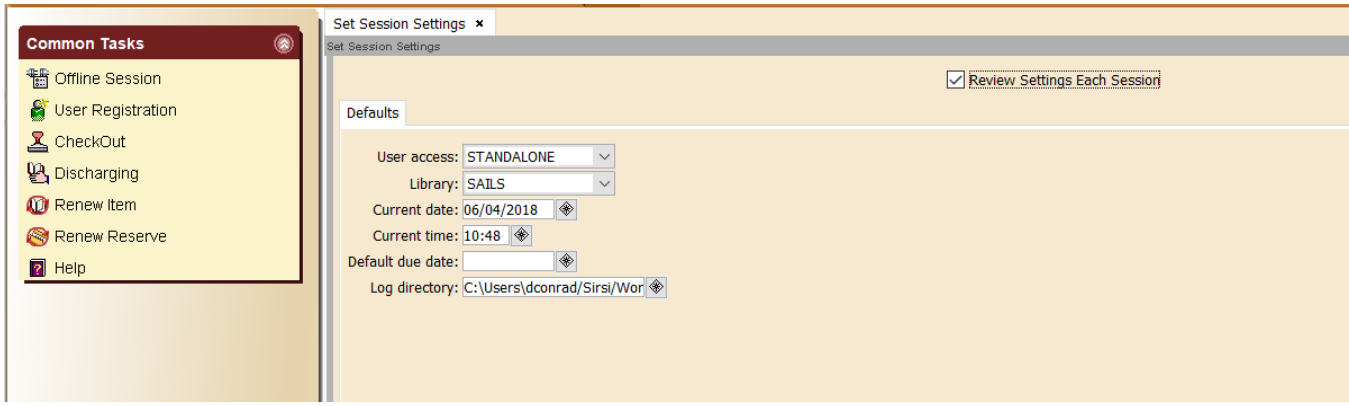
Click OK. A window will appear with the message that these changes will not go into effect until you restart your workstation.

Now you will want to prepare your settings for using off-line. Start up workflows but this time click on the Operate in Offline Mode option. Note that IP Address and other information is now greyed out.



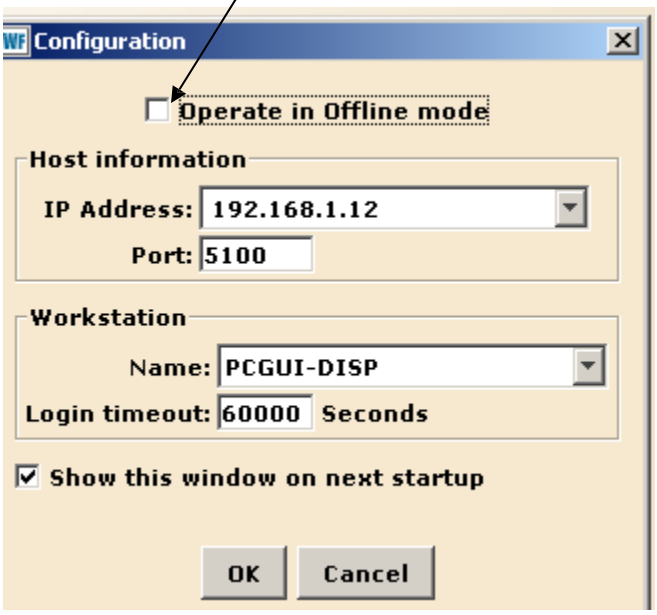
When the Workflows screen appears click on the Offline toolbar





The User access should be set to STANDALONE (you can select this form the pull down list)
The Library should be set to your Library.
The date and time come from your computer. Make sure this is accurate.
Do not enter a Default due date. The system will supply a due date using your library's circulation map when the transactions are uploaded to the system.
Make a note of where the Log directory is because this is where transactions will be stored. If you have multiple log-INS on the same computer a log will be created for each user. You need to make a note of this because all of these logs must be uploaded before you can start using the system again when service is restored. Contact SAILS if you will be using a computer that has different log-ins for staff members. If you are unsure contact SAILS.

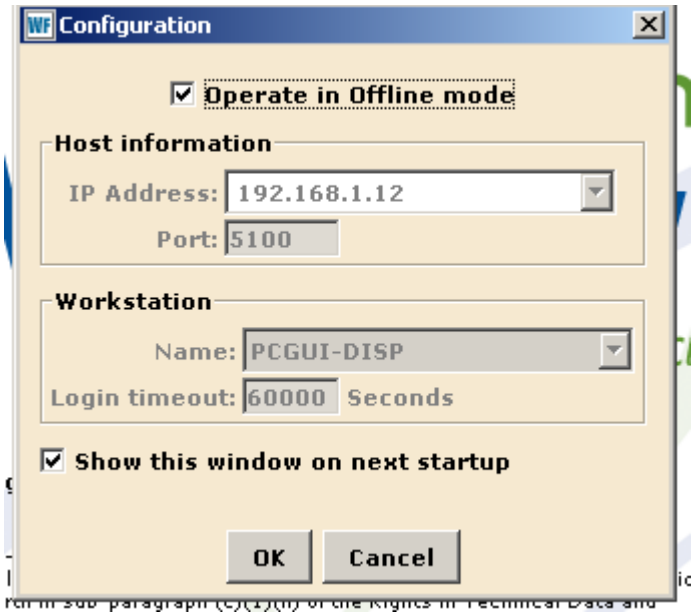
Now you can exit workflows. **Be sure that when you log back into Workflows you uncheck the box Operate in Offline mode**



USING OFFLINE CIRCULATION DURING DOWNTIME

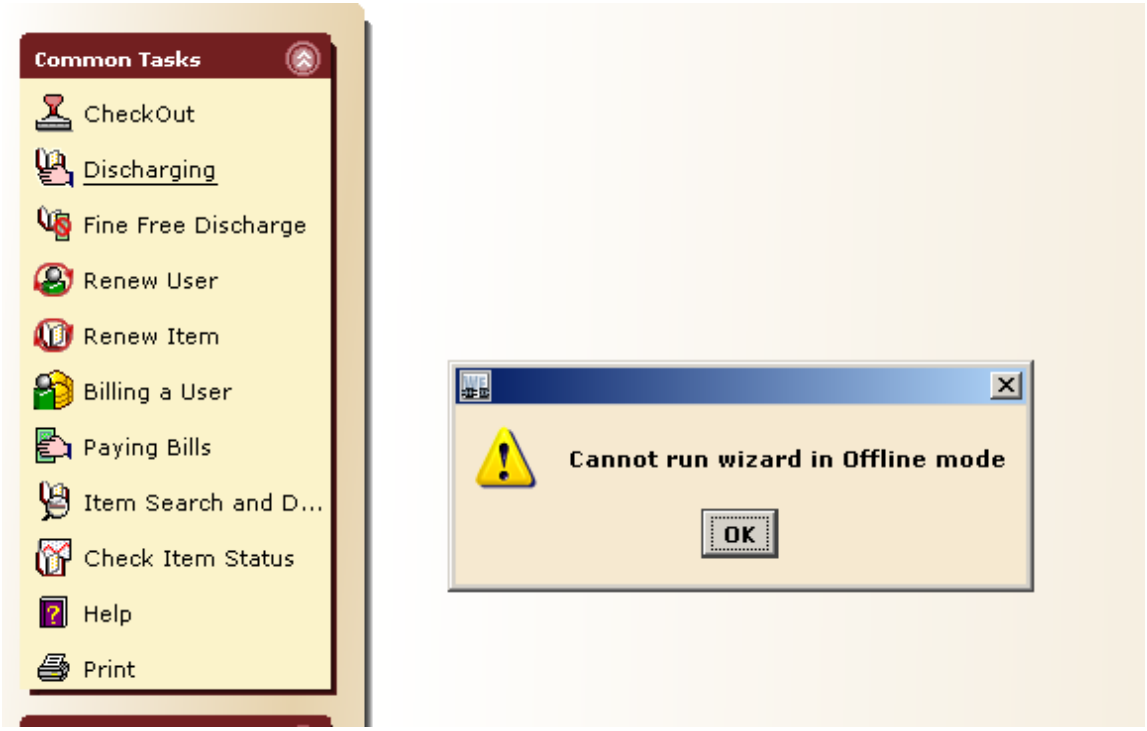
When you log into workflows the Configuration screen must display and you must check Operate in Offline Mode.
If you try to log-in without checking that option you will receive an error message.

If you forgot to set your configuration screen so it displays the Operate in Offline mode, contact SAILS (508-946-8600 ext.1) and someone will walk you through another way to get this to appear although this is NOT RECOMMENDED.

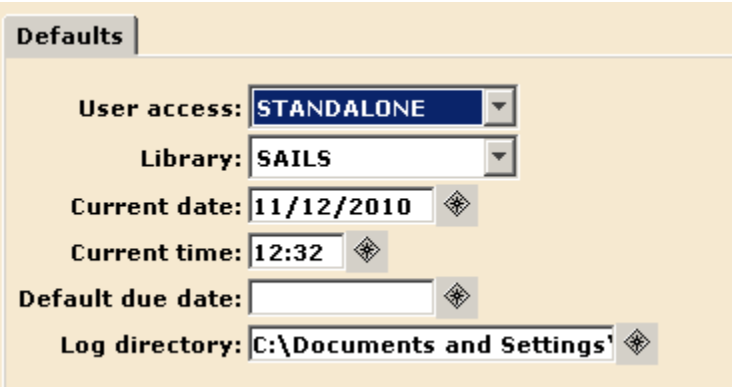


Once you have logged in make sure that you have selected the Offline toolbar.

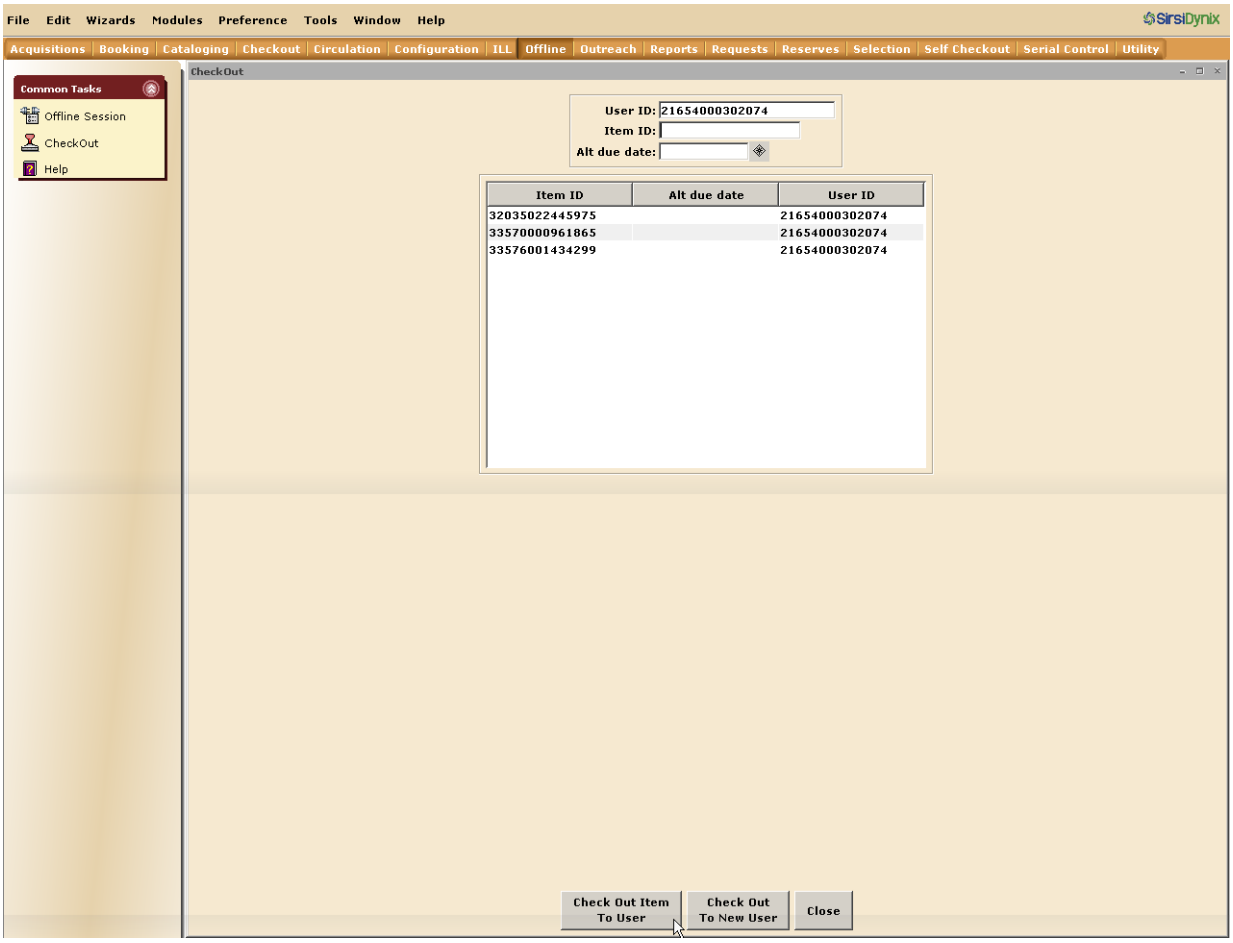
The software will not allow you to use the Circulation Toolbar functions in offine:



Check your session settings to ensure you are logged in properly and the date and time are correct



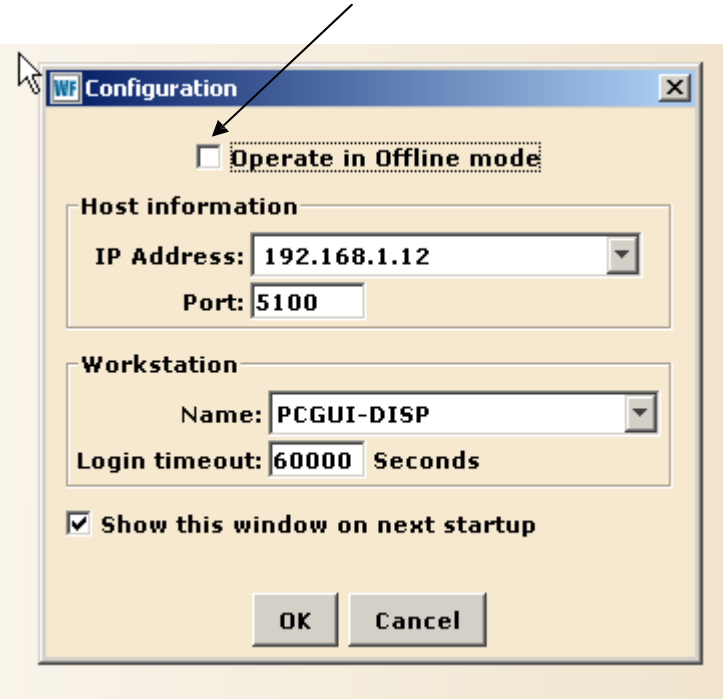
Select the option for Checkout in the Task Bar. Scan the patron's barcode in the User ID Field. Position your cursor in the Item Id Box and begin checking out items. Remember – you are not really connected to the system so you won't see a due date, won't get a message if the patron owes a fine or is blocked, and won't get an error message if you scan an item barcode in the User ID field.



You do not have to select the Check Out Item To User providing the item barcodes appear in the box. After you have completed checking items out to one patron, click on Check Out To New User to begin checking out to a new patron. When you are done for the day, click on Close and log off.

LOADING TRANSACTIONS

Continue using Workflows in Offline mode until you have your Internet back up. Please call SAILS before you log into Workflows. Log back in but this time uncheck the Operate in Offline Mode option.



When you log into the system, Workflows automatically uploads the offline file and then removes it from your workstation. If you have a large file it may take several minutes for workflows to transfer the file to the server. Workflows does not give any indication that the transfer is finished. All of the computers that were running Off-Line must be logged in so that the files can be uploaded and they must be logged in immediately. Designate someone on staff to verify that all the circulation computers have been logged in. Contact SAILS immediately.

Once all of your computers have been logged in SAILS must run a report to process your off-line transactions. Do not begin discharging items until SAILS notifies you that all of the logs have been processed. Once all of the transactions have been processed you may resume normal circulation.

A very common problem is that staff members who are not used to seeing this screen try to enter something in the IP Address Field or panic and think Workflows is broken. Note – the IP address that appears in this screen shot is the one you should use. It is the IP address for the SAILS server.

What happens if a patron is BLOCKED or BARRED

Users with a current BLOCKED or BARRED status will be permitted to check out items. When the Load Offline Transactions report is run on the SirsiDynix Symphony server when the server is available, the BLOCKED or BARRED user's status is first changed to OK, and the transactions for the user are loaded into SirsiDynix Symphony. Then the user status is returned to BLOCKED or BARRED. This feature of the report prevents the transactions from failing and the loss of the charge information in libraries that do not use the delinq file.

What happens if an item is checked out to a patron who still has the item charged to his or her user record?

If an item already checked out to a patron is charged by that patron again, the item will be renewed for that patron when the transactions are uploaded to the SirsiDynix Symphony server with the Load Offline Transactions report.

What happens if an item is already checked out to a patron other than the patron presenting the item for checkout?

If an item is already checked out to a patron, then checked out by another patron, the item is discharged from the original patron and checked out to the new patron when the transactions are uploaded to the server with the Load Offline Transactions report.

Does Offline WorkFlows take User Groups into consideration?

If your site uses the User Groups feature, group information will be written to the offline transactions log. If the delinq file is used and this user's responsibility level is LINKED, then this user will inherit the delinquency status of the worst-case user in the group. This status will be taken into consideration at the time the offline transactions are loaded into SirsiDynix Symphony.