

OFFLINE MODE
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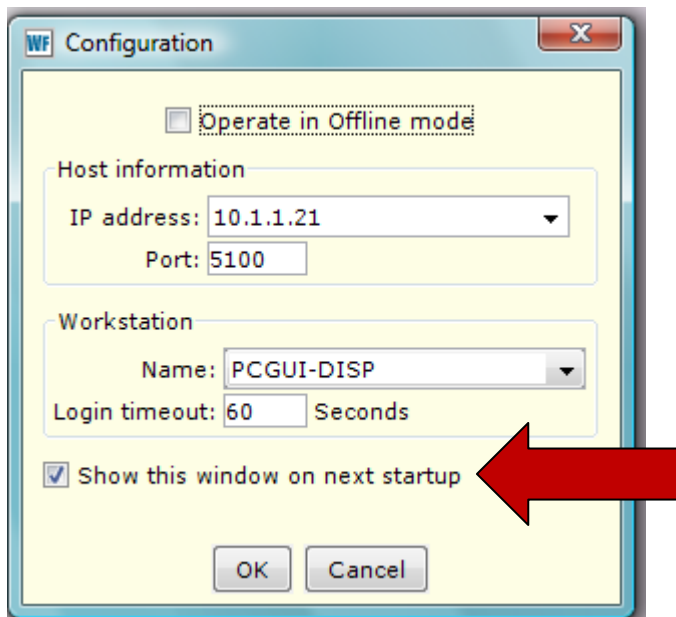
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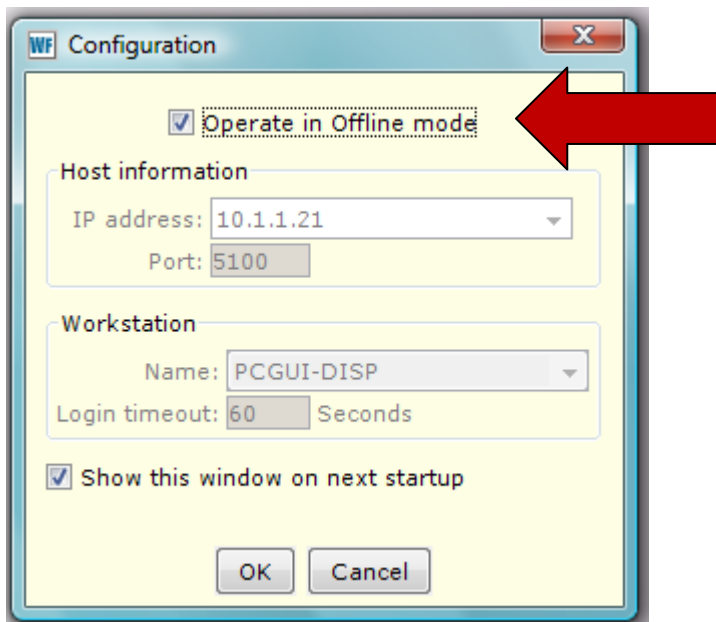
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Starting Workflows

1. The day before any scheduled down time:
 - a. Open Workflows and go to the Configuration box
 - b. Check the “Show this window on next startup” box
 - c. Click “OK” when prompted



2. The next day, when the server is unavailable:
 - a. Check the “Operate in Offline Mode” box



- b. Click “OK” when prompted
3. Switch to the Offline toolbar
4. Check your Offline Session Settings (as detailed on next page)

Offline Session Wizard

1. In the Offline Tab, click on the Offline Session wizard
2. Check that these fields are filled out correctly:
 - a. User Access = Standalone
 - b. Library = [your library's code]
 - c. Current date = Today's date
 - d. Current time
3. Leave Default due date blank
4. You can ignore the Log Directory
5. Make sure that the "Use user delinquent list file" box is checked

Review Settings Each Session

Defaults

User access: STANDALONE

Library: MULLICA

Current date: 09/09/2009

Current time: 9:09

Default due date:

Log directory: C:\Users\karen\Sirsi\Workf

User status generated on:
 Use user delinquent list file

6. You are now ready to begin using Offline Circulation

New User Registration Wizard

1. *If the Session Settings box comes up*
 - a. Check that these fields are filled out correctly
 - i. User Access = Standalone
 - ii. Library = [your library's code]
 - iii. Current date = Today's date
 - iv. Current time
 - b. Leave Default due date blank
 - c. You can ignore the Log Directory
 - d. Make sure that the "Use user delinquent list file" box is checked
2. Do not use your barcode scanner or your enter key until you've completed all registration fields
 - a. Workflows interprets the scanned barcode as if you clicked "OK"
 - b. Type in the user id by hand
 - c. Or scan it in after all other information in the record is complete
3. Fill out the following fields on the User information tab:
 - a. User ID
 - b. Title: Preceding only: Dr., Rev., etc.
 - c. Last name, first name

- i. In this format: SMITH, NANCY L
- ii. If patron wants to use a following title (Jr., DDS, etc), use this format: "SMITH, NANCY L. JR."
- iii. This line cannot contain more than 28 characters

d. Library

e. User profile

4. Move to the User address tab

a. Always make sure the "primary" radio button is on the left side of User address 1

b. Complete the User Address information

i. STREET (this line cannot contain more than 28 characters)

ii. CITY/STATE (this line cannot contain more than 28 characters)

iii. ZIP

iv. EMAIL

v. HOMEPHONE, if supplied

vi. WORKPHONE, if supplied

vii. PHONE, if supplied

c. Complete User address 2 and 3, if necessary

5. Move to User Extended Information

- a. Add Birth date, if supplied
 - b. Enter customer's preferred NOTIFY_VIA information
 - i. PHONE (All CAPS)
 - ii. EMAIL (All CAPS)
 - iii. MAIL (All CAPS)
6. When finished click "OK" to save user information

Checkout Wizard

1. *If the Session Settings box comes up*
 - a. Check that these fields are filled out correctly
 - i. User Access = Standalone
 - ii. Library = [your library's code]
 - iii. Current date = Today's date
 - iv. Current time
 - b. Leave Default due date blank
 - c. You can ignore the Log Directory
 - d. Make sure that the "Use user delinquent list file" box is checked
2. Scan user's library card
3. Scan item ID
4. No receipt will print. Be sure customer is aware of due dates.

Discharge/Checkin Wizard

1. Since using this wizard does not notify staff of On Hold items or items that should go In Transit to another library, SirsiDynix recommends that we *DO NOT* use this wizard.
2. Plan to store all returned items during down time and discharge them once Workflows is back and all Offline reports are complete.

Holds

1. Offline Circulation will not accommodate placing holds, so you may want to plan to record any Hold requests manually during the down time
 - a. Record customer name and barcode number
 - b. Record item Title and Author
 - c. Record date and time of request
2. Or, ask customers to wait to place their holds once the system is again available

Renew Single Item Wizard

1. *If the Session Settings box comes up*
 - a. Check that these fields are filled out correctly
 - i. User Access = Standalone
 - ii. Library = [your library's code]
 - iii. Current date = Today's date
 - iv. Current time
 - b. Leave Default due date blank
 - c. You can ignore the Log Directory
 - d. Make sure that the "Use user delinquent list file" box is checked
2. Scan item ID
3. No receipt will print. Be sure customer is aware of due dates

When Workflows Is Restored

1. Click on the exit button to exit your current Workflows session
2. Click “yes” to end your workstation session
3. Double-click the Java Workflows icon to log back in to Workflows
4. Go to the Configuration box
5. Karen will supply each site updated IP address and port information once the migration team has completed all necessary steps
6. Log in to the SaaS server
7. You can now begin checking out material
8. You can now begin placing holds on material
 - a. Enter manually recorded holds in the order they were placed first
 - b. Then begin accepting hold requests from customers
9. Do not check in anything until instructed

After Stored Items have been Discharged

1. Once the Offline data has been transferred to the server, Karen will notify each site to begin checking in returned items
 - a. Check to be sure Holds receipts print correctly
 - b. Check to be sure Transit slips print correctly
2. After all stored items have been checked in, notify Karen at karen@gcls.org or it@gcls.org
3. Karen will provide each site with a list of Offline transactions that failed to load, if necessary.