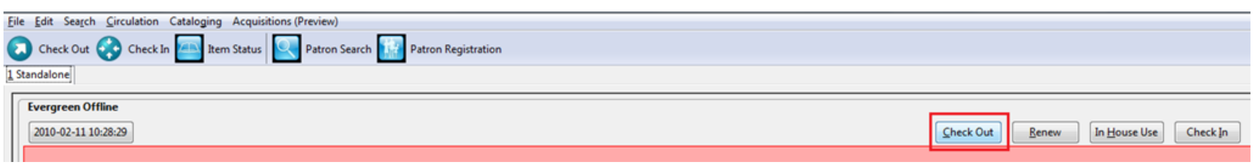
Offline Circulation for Administrators

Evergreen 1.6

Occasionally, your staff may need to work offline. The need to work offline may be planned or unplanned. If you know that your network will be going down, you can download an offline patron list to your workstation. This will prevent your staff from inadvertently checking items out to blocked, expired, or patrons with penalties during the outage. If you do not know that your network will go down, then you they can enter the offline interface directly from the Circulation menu. Some administrators make it a practice to download the offline patron list every evening so that if circulators came in the following morning to a network outage, librarians could circulate items with the most up to date information.

1. If you know that you need to work offline, go to each workstation and log in. You can do this by using the **Change Operator** menu item in the **Admin** menu. Next, in the Admin menu, click **Download offline patron list.**

2. Now, your staff can enter the offline interface from the Circulation menu. After entering the offline interface, a pink screen will appear with the time and date in the left corner and buttons for circulation functions in the top right corner. Staff should click the button for the action that they want to perform. The following example is for the **Check Out** button.



3. Six steps to check out will appear:

a. Check the date/time to ensure its accuracy.

b. Enter the patron's barcode: 891011. Check the box to ensure that the patron's barcode meets the patron barcode format that you have established. For example, if your patron barcode format requires 13 digits, checking this box will ensure that the scanned barcode meets that standard.

c. The **Enter the item due date** field should populate automatically. Staff can also click the drop down arrow adjacent to **choose one of these** alternate due dates.

d. Enter the item barcode: 3010200002861

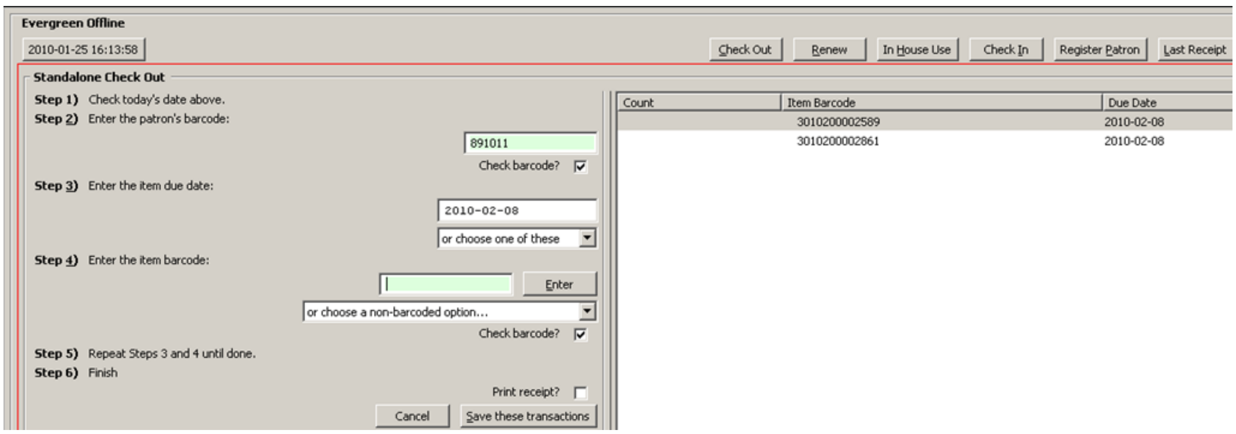
e. They may click **Check the Barcode?** box to check the item barcode against the format that you have proscribed for barcode standards.

f. Click **Enter**.

g. Enter another item barcode to check out, or click another function, such as **Renew**.

h. They can check the **Print receipt?** box if they would like to print a receipt for the patron.

The items that have been checked out will appear on the right side of the screen.

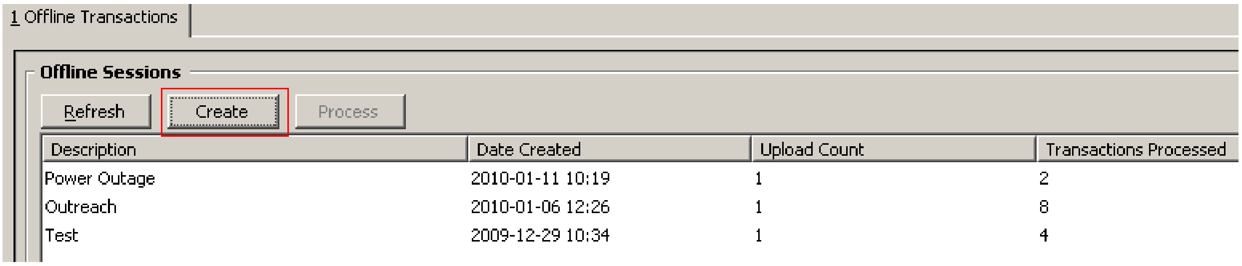


1. After they have finished a transaction(s) with a patron, they should click **Save these Transactions**. The encounter with the patron may include performing several activities, such as checking out one item and renewing two more items, or any other combination of activities. However, after the staff member has finished interacting with the patron , the staff member should click **Save these Transactions** to save the transactions and to clear the screen for the next patron.

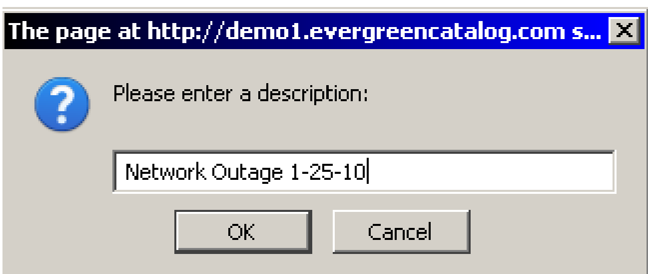
2. After staff have finished working in offline mode, you will need to upload the transactions that they made in offline mode to the database. You can do this by going to their workstations, logging in, and uploading the transactions. Or, you can give your staff the permission to upload the transactions from their workstations. The permission needed to upload a transaction is OFFLINE_UPLOAD.

3. Use the **Change Operator** menu item to log in to the workstation. Then click **Admin → Offline Transaction Management.**

4. A screen of previous transactions will appear. Click **Create** to create a new offline session.



5. A pop-up box will appear. Enter a name for the time in which offline mode was in use. Click **OK**.



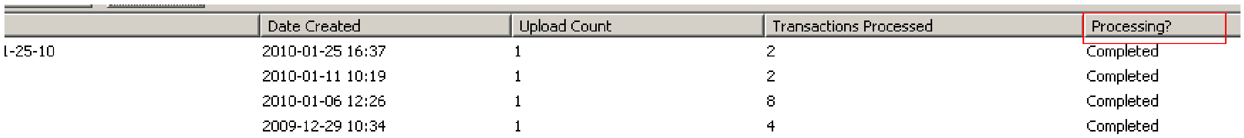
6. The unprocessed offline session will appear at the top of the list, and a new window will open in the bottom half of the screen. Highlight the session that you just finished, and click **Upload** in the top right corner.

7. A message will appear to alert you to the uploading session. After the session has uploaded, highlight the session. It will appear in the bottom pane.

8. While the transaction is highlighted, select **Process.**

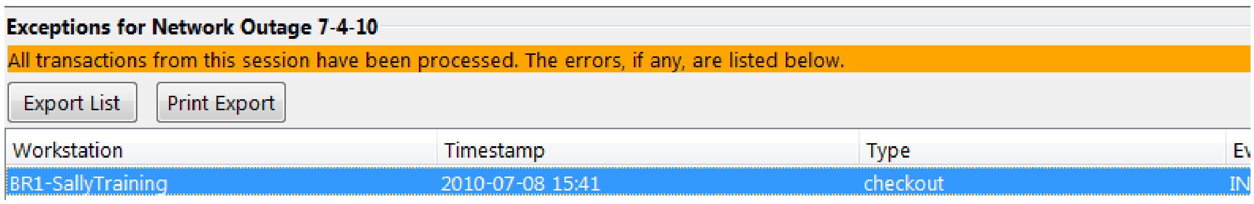
9. Select **Refresh** .The screen will refresh, and the session will be updated in the top half of the screen.

10. The **Processing?** column notes that processing has been completed. You have now completed the offline session.



	Date Created	Upload Count	Transactions Processed	Processing?
1-25-10	2010-01-25 16:37	1	2	Completed
	2010-01-11 10:19	1	2	Completed
	2010-01-06 12:26	1	8	Completed
	2009-12-29 10:34	1	4	Completed

11. Occasionally, a transaction will not process correctly because a barcode has been scanned incorrectly, etc…. If that occurs, the problems will display below:



12. If you see an error, click **Retrieve Item** or **Retrieve Patron** to investigate the error.