

Using Workflows Off-line Mode

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(Adapted from instructions by the Suburban Library Cooperative of Clinton Township, MI)

All RSA on-line libraries will be using Unicorn's off-line mode from Dec. 1st through Dec. 5th, as we do the final conversion and transfer of CARL data to the New System. The following instructions should help you to understand how to use off-line mode during this important transition. Offline mode can also be used anytime you have issues connecting to the RSA servers that last more than a couple minutes (your internet connecting is down, RSA loses power, etc.)

Important things to know about Off-line Mode:

1. The only functions you will have available to you in offline mode are Checkout, Discharging (aka Check-in or Returns), Renew Items and User Registration.
2. In off-line mode, the system will not know whether patrons have overdue or fines, whether the patron has been blocked due to excess fines, or what titles the patron may have checked out previously. We may add some of these features in the future if the file sizes aren't too large.
3. Patrons will need to have their bar-coded library cards. There is no way to look up patrons by name in off-line mode. Should you wish to check books out to patrons without library cards during this process, you would have to simply write down their name and the bar codes of the books they take and enter them manually on Dec. 6th.

Smart Preparation Step to take the Week of Nov. 26-30th

Sometime the week of Nov. 26-30, it would be smart to complete the following task to ensure that you are ready to use off-line mode on Dec. 1st.

1. Open up workflows just as you have while practicing on the system.
2. Click once on the menu that says "Preference" at the center top of the Workflows screen.
3. In the drop-down box that appears, click on the top choice that says "configuration."
4. You should now see the standard Configuration box. Ensure that there is a check-mark in the box that says "Show this window on next startup."
5. Click on OK. This should ensure that your software is properly configured to access the off-line mode.

Starting Workflows in Off-line mode

1. If for any reason you have Workflows already running, shut it down by clicking on the X in the upper right hand corner. Click on 'Yes' to Halt Workstation.
2. Start Workflows by double clicking on the Workflows icon on your desk top.
3. In the Configuration box that appears, put a check mark in the box next to "Operate in Offline Mode." Note that this grays out the Host information and Workstation boxes.
4. Click on [OK] and wait for Workflows to start.



Switching to the Off-line Module

Workflows will open in the same module in which it was closed. For most libraries, this will be the Circulation or Cataloging module. If you attempt to check out items in the Circulation module, you will get this message.



To do any work in Off-line mode, you must select the button labeled 'Offline' near the top of the screen. This will put you in the Off-line module. (See button circled in the picture below.)



Left click on the off-line button. This will bring up the off-line wizards.



Your first task upon starting up the off-line mode is to set-up an "Offline Session."

Setting up an Off-line Session

The Off-line session wizard sets the properties for the other wizards. If you try to use the other wizards without going to Offline Session first, it will come up automatically.



The screenshot shows a window titled "Set Session Settings" with a "Defaults" tab. In the top right corner, there is a checked checkbox labeled "Review Settings Each Session". Below this, the following settings are displayed:

- User access: STANDALONE (dropdown menu)
- Library: UPL (dropdown menu)
- Current date: 11/26/2005 (calendar icon)
- Current time: 14:22 (clock icon)
- Default due date: 11/18/2005 (calendar icon)
- Log directory: C:\Documents and Settings\ (folder icon)

Please leave the “Review Settings Each Session” check box checked. Set the other settings as follows:

- **User Access** – Set to “STANDALONE”
- **Library** – Choose your library’s Unicorn name (your login name without the CIRC or TECH). Remember that you can type the first couple of digits of your library name to go directly to it in the list.
- **Current Date** – Should be correct; check it to be sure
- **Current Time** – Based on your computer time – also check it to be sure it is correct
- **Default due date:** Set to the standard for your library, normally either 2 weeks or 3 weeks from today. Do this by clicking on the diamond-shaped gadget and choosing the date from the calendar, then clicking [OK]. This date can be changed manually during checkout for DVD’s, etc.
- **Log directory:** Leave as set

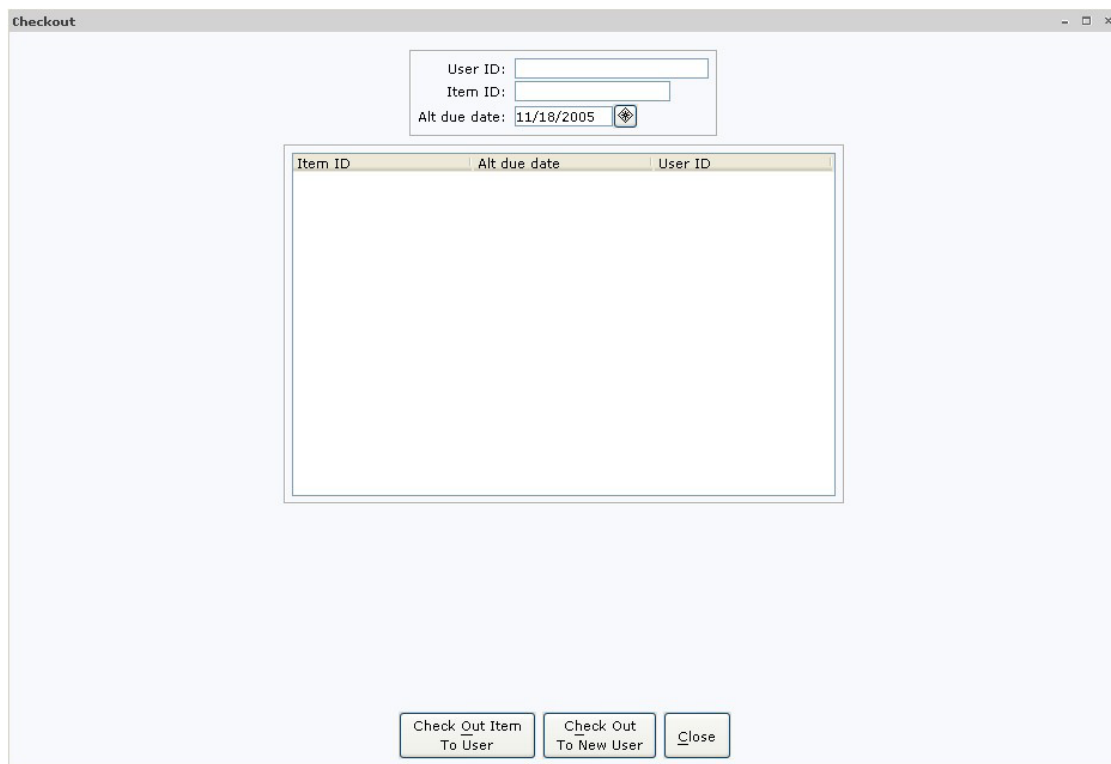
When you get everything set correctly, click on the [OK] button at the bottom of the screen.

Functions within Off-line Mode

In theory, one can checkout, discharge (check-in) and renew items, as well as create new patron records while in offline mode. Libraries may choose not to use all of these functions on a local level. Creating new patrons in offline mode might be tricky as you can’t search the system to see if someone is an existing patron.

Checkout

The checkout wizard in off-line mode looks much like the checkout wizard in on-line mode.



The screenshot shows a window titled "Checkout" with a light blue background. At the top, there are three input fields: "User ID:" with an empty text box, "Item ID:" with an empty text box, and "Alt due date:" with a text box containing "11/18/2005" and a diamond-shaped calendar icon to its right. Below these fields is a large white rectangular area with a thin border, which serves as a table for the checkout list. The table has three columns: "Item ID", "Alt due date", and "User ID", with the first two columns currently empty. At the bottom of the window, there are three buttons: "Check Out Item To User", "Check Out To New User", and "Close".

Scan in the patron's library card, then scan in the books/items that they are checking out. When you are done checking out a particular user, click on the [Check Out to New User] or use the alt-k keyboard shortcut. As soon as the books show in the white box, they are checked out.

Note that although the program lists "Alt. due date," there is nothing alternate about it. This is the due date that will be used. It can be changed by clicking on the diamond-shaped box to the right of the date and choosing the correct date from the calendar

For any books or other items that check out with a date other than the standard due date, you will need to manually change the date before checking out the item. If you change the date, it will stay changed until you change it back, even between multiple users. Closing and then re-opening the Checkout wizard will reset the date to the default you set earlier in the off-line session setup window.

When checking out items in the off-line mode, always double-check your due dates.

Update: (11-29-07) Receipt Printers: At this time, we recommend not using receipt printers in off-line mode. (Unless your settings are very precisely configured, trying to print receipts can "freeze up" the checkout and renew wizards.) If you have already completed settings for a receipt printer, you will need to turn off receipt printing in the off-line module. To do this, right-click on the Checkout wizard in the offline module, choose **properties**, then make sure that the setting for "Charge Printing" is set to 'None.'

Receipt printing should be available for off-line checkouts in the future.

Discharge/Check-in

When you check in materials in off-line mode, the system will not inform you of any holds on the item. During this transition, this will not be a problem as we have stopped using CARL for holds anyway. However, when you use discharge in off-line mode after Dec. 6th you may choose to set aside newer or popular books until you are back online.

Discharging books is very straightforward. Set the discharge date first, using the diamond-shaped gadget to pick the date from the calendar. Then simply scan in the books or items one at a time.

Normally, you will not need to use the [OK] button unless your scanner does not automatically include and [Enter] at the end of the scan.

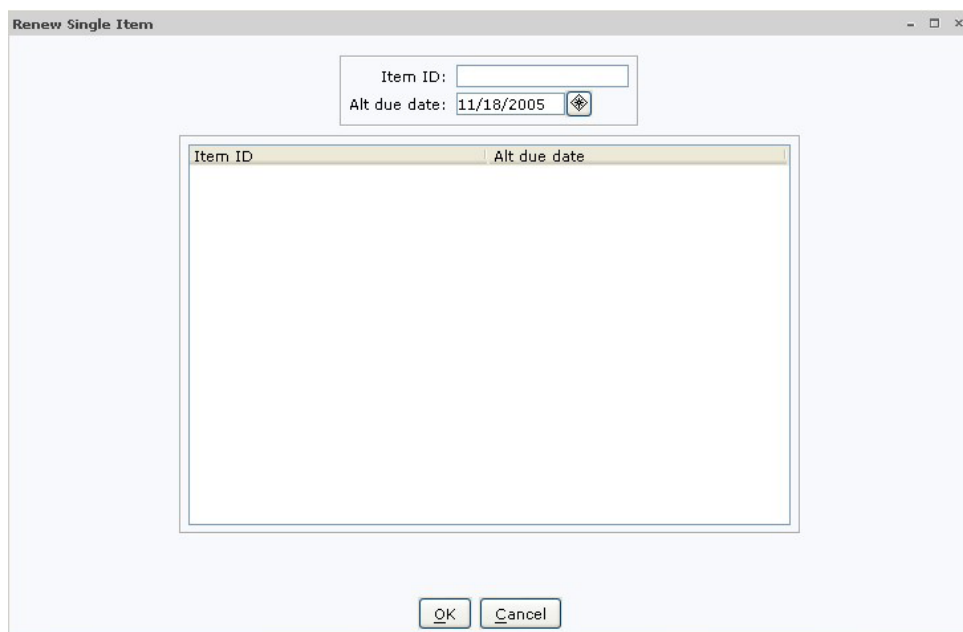


The screenshot shows a software window titled "Discharge/Checkin". At the top, there are two input fields: "Item ID:" and "Date of discharge:". The "Date of discharge:" field has a diamond-shaped icon to its right, which is a calendar picker. Below these fields is a large, empty table with two columns: "Item ID" and "Date of discharge". At the bottom of the window, there are three buttons: "OK", "Clear Discharge List", and "Cancel".

Renew Items or Reserves

This permits the renewal of one item at a time, no patron card necessary. Again, always check the date before proceeding.

The Renew wizard has no way of checking for holds or if an item is over the renewal limit in offline mode. Therefore, you may find that you get fewer error messages if you discharge items, then check them out to the patron instead of renewing them.



The screenshot shows a software window titled "Renew Single Item". At the top, there are two input fields: "Item ID:" and "Alt due date:". The "Alt due date:" field has the value "11/18/2005" and a diamond-shaped icon to its right, which is a calendar picker. Below these fields is a large, empty table with two columns: "Item ID" and "Alt due date". At the bottom of the window, there are two buttons: "OK" and "Cancel".

Renew Reserves is normally only used by academic libraries.

Update: (11-29-07) Just as in Checkout, if you have set up receipt printers, make sure that you have turned off "Charge Printing" in the Renew Item Wizard for off-line mode.

User Registration

You may register and create cards for new patrons while in off-line mode. However, there is no way to check the database to ensure that the new patron does not already have a card at your library or another. If you choose to use this wizard, we recommend that you keep a record of all patrons registered while in offline mode, so that you can check for a duplicate registration when we go online.

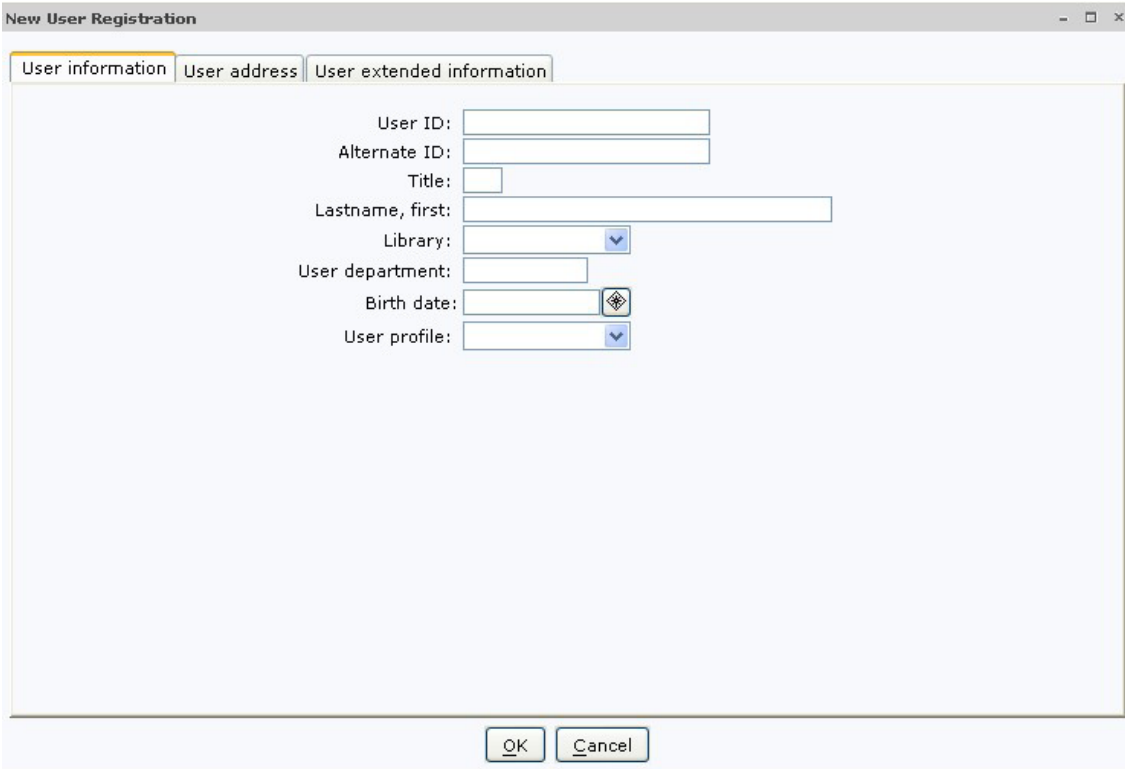
When selection this wizard, you will first be presented with a Property screen asking for the following items:

User library: Your library OR the main library if you are a branch

User department: A free text field that is better left blank unless you use it normally

User profile: The profile normally used. In most public libraries, this will be Adult. In schools it will be Student. Can be overridden when registering each patron.

Once you have filled in the defaults, click [OK]. You will then see this screen.



Complete this as you would in on-line mode.

****IMPORTANT NOTE** (11-29-07)**

If at any point in the User Registration process you hit [Enter], or if you use a scanner to enter the library card barcode, this will COMPLETE THE REGISTRATION process, even if you have not yet entered any user information. To avoid this, either:

1. Enter the bar code number by hand, double-checking to ensure it is accurate, or
2. Enter all of the other user information first, then scan the library card as the last step in the process.

If this error occurs, you will have to wait until we go on-line to finish editing the user info.

Help

The help files work in off-line mode. Note that they may be misleading, since we do not necessarily use some of the features offered. Do not hesitate to contact us at RSA if you have any questions.

Uploading Transactions

This will happen automatically when you next start Workflows in on-line mode. If you have a particularly large transaction file, you might notice an upload message during Workflows startup.

Error Reports

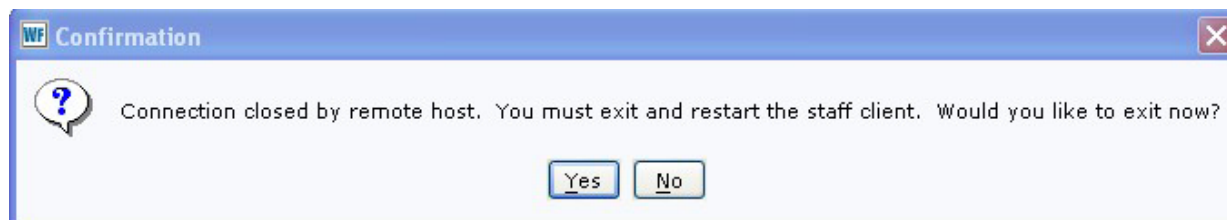
RSA staff will email out error reports to library administrators after we load your transactions. The first time that we do this, we will send instructions along with the errors reports to help you to decipher the report, and to tell you what actions are needed.

Returning to Normal (On-line mode)

Watch your emails closely the week of Dec. 1st-5th for instructions about the whole transition process. When you are instructed to do so, shut down Workflows, then restart it. When the configuration box appears, uncheck the offline mode box, make sure the proper IP address is entered, then click [OK] to continue. When prompted to Update Staff Client, choose [No].

Using the Off-line Mode after Dec. 6th

After Dec. 6th, you will be using the off-line mode any time that you are having trouble connecting, either due to local internet troubles or due to a problem with the server in East Peoria. Normally, you will know you have been “kicked” off-line when you see the following message:



Close Workflows by clicking on [Yes]. Then restart Workflows by double-clicking on the Workflows icon on your desktop and attempt to log in normally. If you can't connect online, you may check the off-line mode checkbox to log into off-line mode as described above.

If the system has been shut down to a server problem, you will normally get an email from RSA noting that there has been a server problem, usually with an estimate of how long it will be before the server is restored. If you suspect that the problem is due to a local Internet interruption, try to visit several webpages in Internet Explorer or another web browser. If you are unable to surf the web, you will most likely also be unable to connect with Workflows.

Live Help

As always, the friendly staff members at RSA are ready to help. Feel free to email us at RSASupport@alliancelibrarysystem.com or call at 309-694-9200 or at 800-700-4857 for additional help.

If you have a specific question for a staff member, feel free to direct your call or email to that person. RSA Staff member hours and email address are available on the new RSA website. That site is linked from the main ALS page via a button on the right side. Here is a direct link to the staff hours page: <http://www.alliancelibrarysystem.com/rsanew/staffhours.cfm> Staff hours are on the left, phone numbers and email address are on the lower right of that page.