



## Traverse des Sioux Library System

1400 Madison Ave., Suite 622  
Mankato, MN 56001-5488

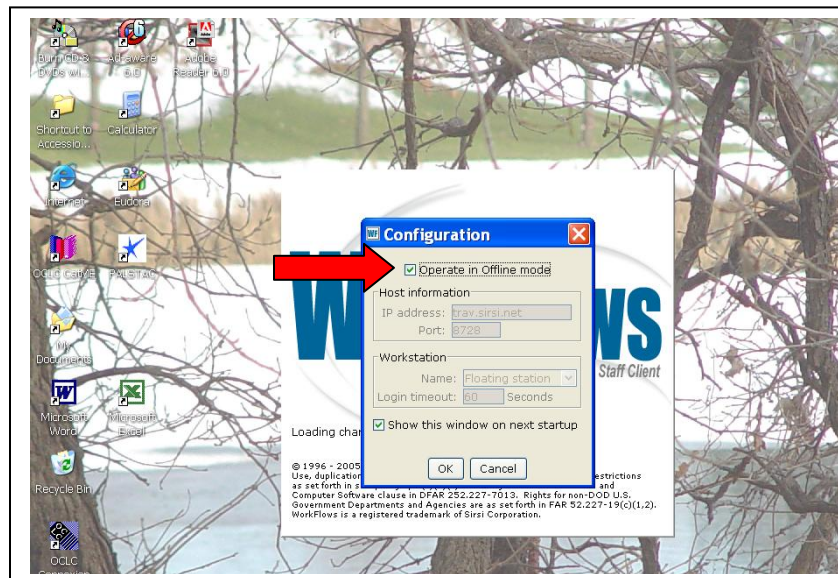
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FAX 507-625-4049  
www.tds.lib.mn.us

rev 4/3/07jd

# Offline Procedures Updated 4/3/07

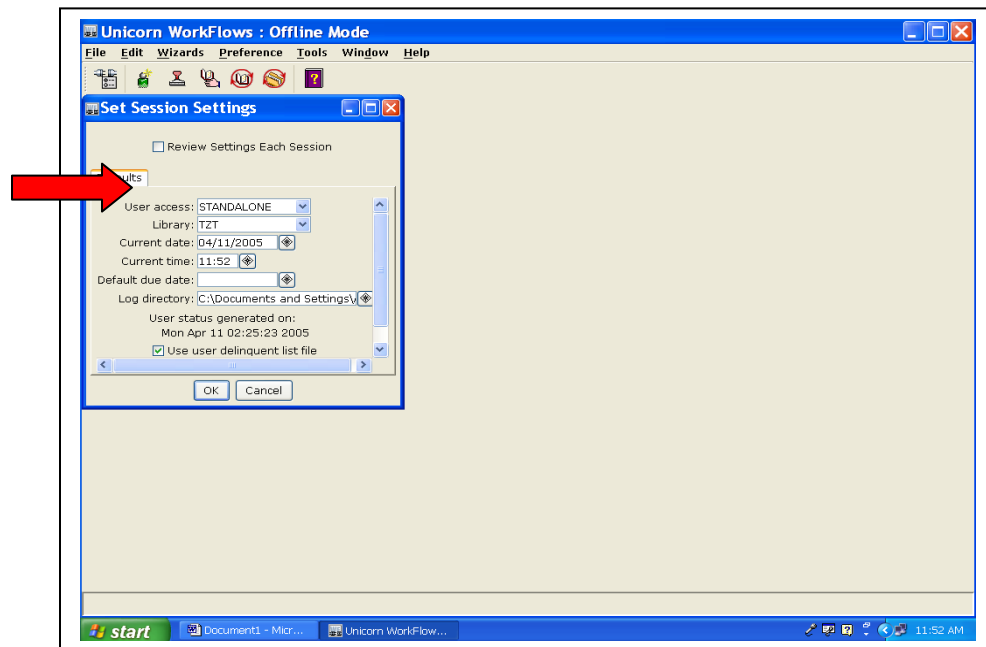
- Contact TdS when you find it necessary to go into backup mode.
- Confirm that the old backup LOG file is deleted. (See last page p. 5 for details).
- Open WorkFlows. **NEVER uncheck the box that says *Show this window on next startup*.** If you don't get this initial configuration window, you will not be able to operate in offline mode when the server is down. **The software does not load if the server is down unless you check the box *Operate in Offline mode*.**

When you check the box *Operate in Offline mode*, you'll notice that the system will grey out the host and workstation information and proceed with loading the software.



- When the software has loaded, you must select the offline toolbar. The system does not automatically do this for you. To change toolbars, click *Preference*. Move down to *Desktop*. Highlight *Current Toolbar* and click on *Select*. A box listing the various toolbars pops up. Click on *offline*. Then click *OK*.
- Click the first icon (square box with electrical plug-ins) on the left to set session settings, next to the red arrow.
  - Do not check *Review Settings each Session* unless you want this box to pop up for every offline transaction you perform.
  - Set User Access to *STANDALONE*.

- Be sure your library is correctly selected from the drop-down list. ***This is critical. The system will need this information so it knows where the transaction originated!***
- Check to make sure the current date and current time are correct.
- You can leave the default date due blank. The system will set the correct date due based on your circ policies when the system comes back up. Or, you can enter a default date due, if you wish.
- Do ***not*** change the log directory.
- If you check the box *Use user delinquent list file*, you will be alerted when patrons with overdue materials attempt to charge new materials. Even though you are offline, the system can refer to a file of patrons with overdue materials that resides on your PC. This file is automatically generated by the system on a daily basis and downloaded to your PC when you login to WorkFlows.

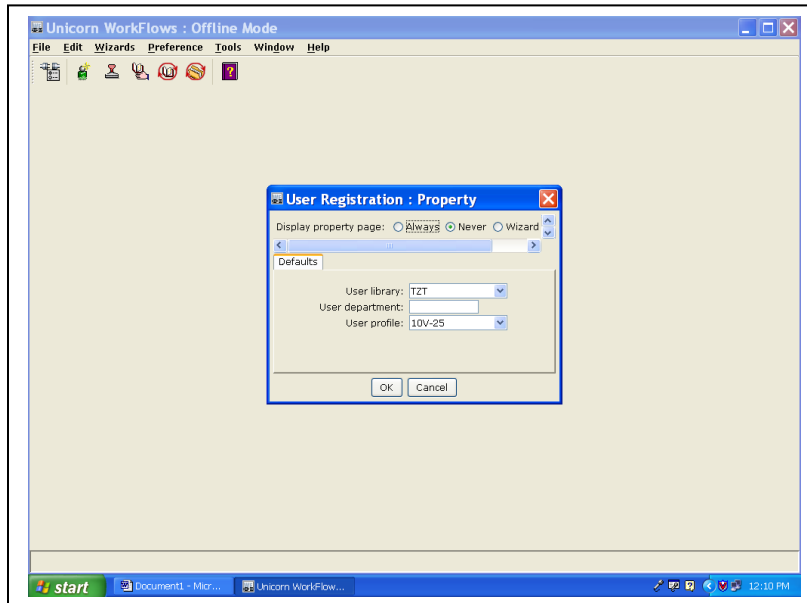


- Click *OK*.
- Before you begin using the offline CheckOut, Renew Item, and Discharge wizards, right click each wizard and click *Properties*. Set *Printing* to NONE. [If the receipt printing on each wizard is not set to NONE, it “hangs” the transaction, and the hour glass will not close.]
- **Before registering a user in offline mode, follow the instructions on the next page.**

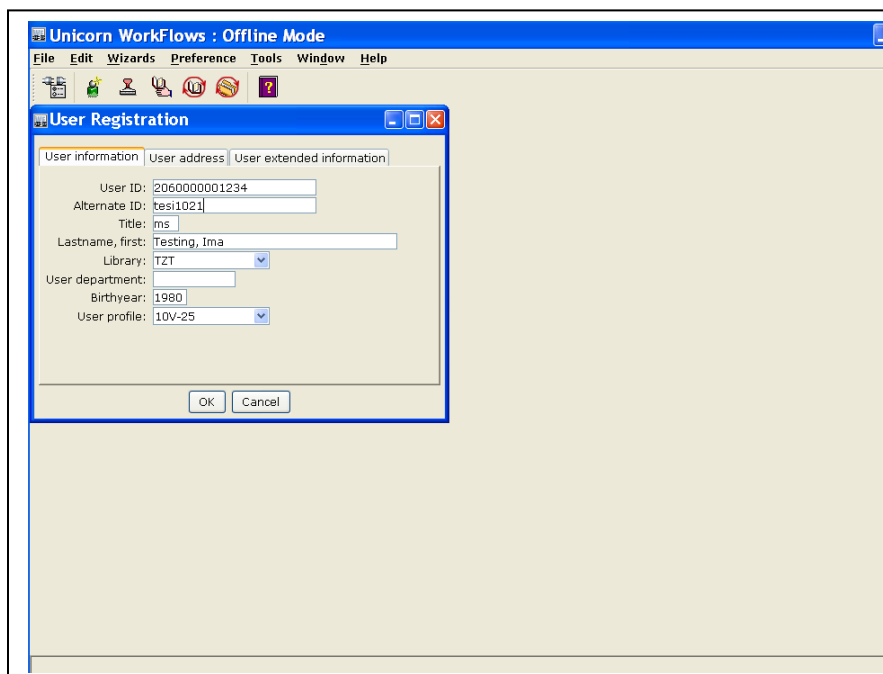
**Special checkout circumstances:**

- If an item already checked out to a patron is charged by that patron again, it will be renewed.
- If an item already checked out to a patron is then checked out by another patron, the item is discharged from the original patron and checked out to the new patron.

- When registering patrons in Offline mode, you will be shown a default property screen. Please select your library from the *user library drop-down list* and set a *default user profile*. Once these have been set, you can choose not to have this window pop up each time by clicking *never* on *Display Property Page*. (If, at some later time, you want to check the property screen, right click on the *register user icon*.)

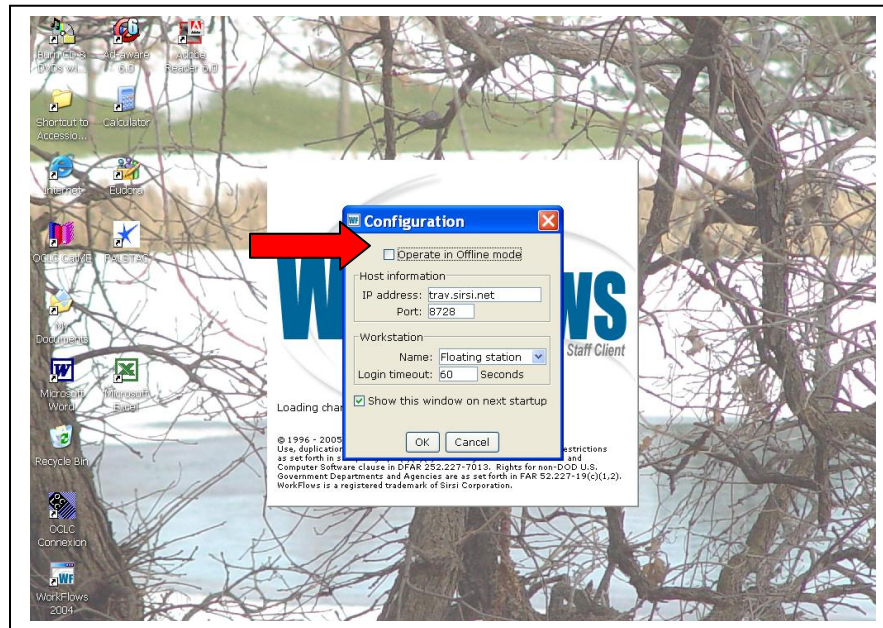


- When adding a new user, fill out **only** the first tab called **User Information**. After the system comes back up, search for the patron name and add the address and extended information. The reason for this is that the data entered in the address and extended information fields in the offline form must exactly match the input of data in our online forms. If it doesn't, your statistics and reports won't be correct and data could be lost.



# Sending Offline Transactions

- As a safety precaution, we recommend that you copy your LOG file to another folder in case there is any problem with the upload (see instructions on p. 5). Do NOT proceed to the step below until you make a back up copy.
- Open WorkFlows, but **uncheck** the *Operate in Offline Mode* box.

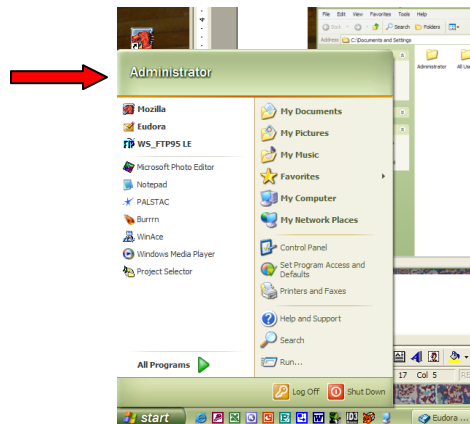


- Click OK.
- Login with your CIRC user ID and Password. (Just by logging in, the PC will send the offline backup files to the Sirsi.net server.)
- You will still see the offline mode toolbar. To change toolbars, click *Preference*. Move down to *Desktop*. Highlight *Current Toolbar* and click on *Select*. A box listing the various toolbars pops up. Click on *Circulation*. Then click *OK*.
- **Call TdS when you have completed these steps!** TdS staff will proceed with processing backup files.

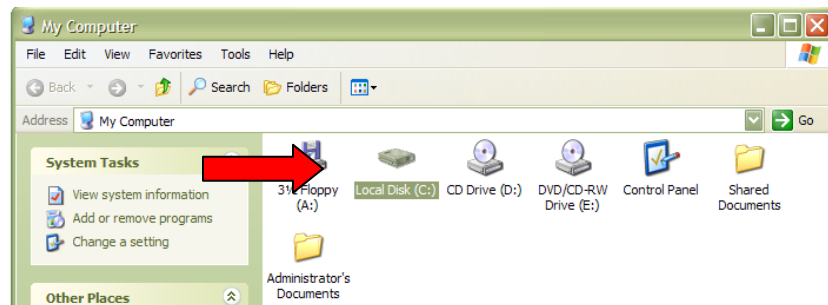
# Copying the LOG file

If you need to use Offline Mode, we recommend making a backup copy of the LOG file. After closing Workflows in *offline mode*, and **BEFORE** your re-open it and go back *online*, follow the procedures below.

- Open the START menu and look at the login name at the top of the menu. If you have Windows XP your login name will be at the top of the menu screen.

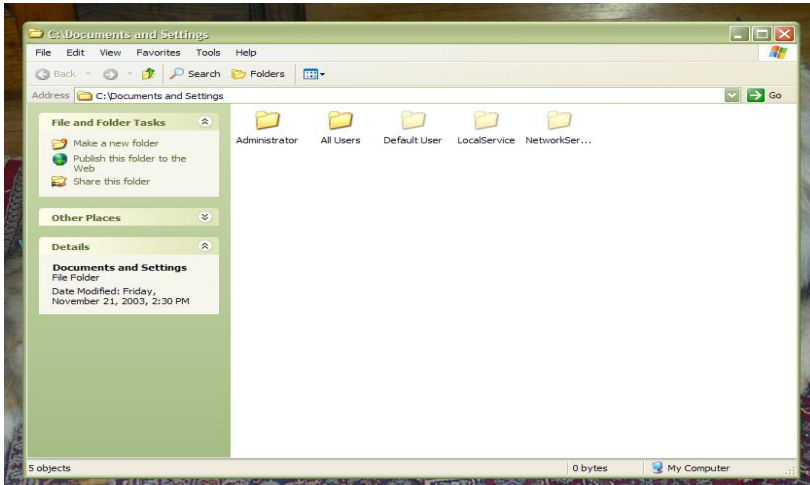


- If you do not see this information choose “Shut Down” and look in resulting the list for – Log off xxx (where xxx is the name you are logged in as).
- In the START menu open “My Computer”.
- In My Computer open Local Disk (C:)



- Open “Documents and Settings”.
- The Documents and Settings folder will contain a number of folders – only one should have the Sirsi folder within it.

Here is an example of a typical documents and settings folder. As can be seen there is an “Administrator” folder. Since the user is logged in as “Administrator” that is the folder which contains the Sirsi file.

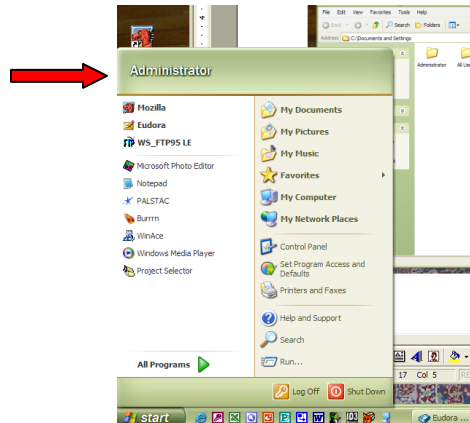


- Open the folder that corresponds to your login name.
- Open the Sirsi folder.
- Within the Sirsi folder, open the “Workflows” folder.
- Within the Workflows folder, look for the LOG folder
- Open the LOG folder
  - The log folder contains a file, which should be named with the three-letter code for your library, you will need to copy this file to another location, such as My Documents.
  - To Copy the file - right click on it and choose “Copy”.
  - The file should turn a different color.
  - Open My Documents and from the “Edit” menu choose “Paste”. This will *copy* the file to My Documents.
  - The LOG folder should still contain the original LOG file and a second file called the same thing should be in My Documents.

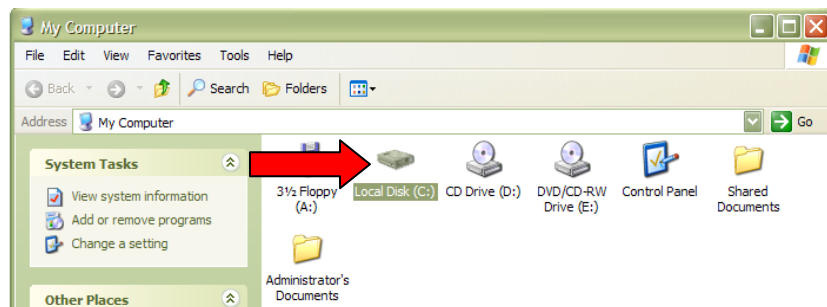
**If this is all too much for you, call John Miller to walk you through the process.**

# Confirming LOG file Delete

- After confirming with TdS that the transmission of your offline file was successful, you need to verify that the LOG file was automatically deleted from your PC.
- Open the START menu and look at the login name at the top of the menu.  
The newer Dell PCs should all log in as “Default”.  
If you have Windows XP your login name will be at the top of the menu screen.

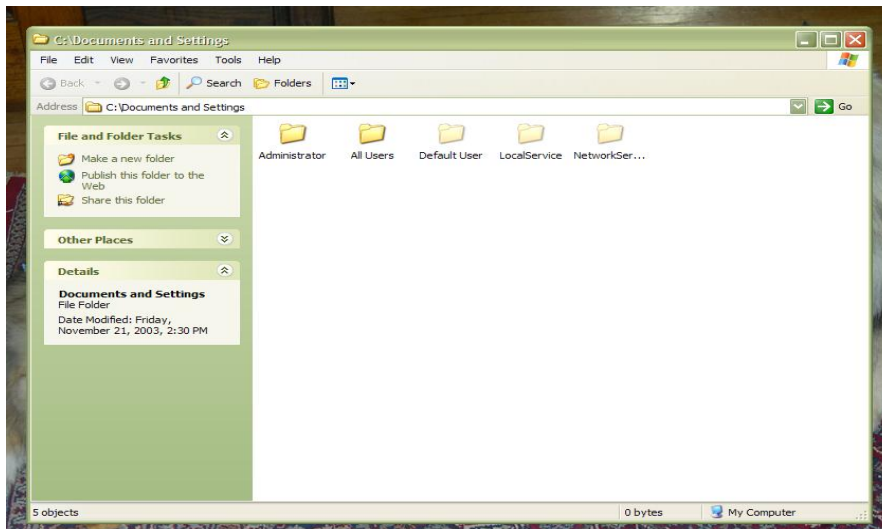


- If you do not see this information choose “Shut Down” and look in resulting the list for – Log off xxx (where xxx is the name you are logged in as).
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- The Documents and Settings folder will contain a number of folders – only one should have the Sirsi folder within it.

Here is an example of a typical documents and settings folder. As can be seen there is an “Administrator” folder. Since the user is logged in as “Administrator” that is the folder which contains the Sirsi file.



- Open the folder that corresponds to your login name.
- Open the Sirsi folder.
- Within the Sirsi folder, open the “Workflows” folder.
- Within the Workflows folder, look for the LOG folder
- Open the LOG folder
  - If the LOG folder is empty you are done and all is well.
  - If the log folder contains a file, which should be named with the three-letter code for your library, you will need to move this file to another location, such as My Documents.
  - To move the file - right click on it and choose “Cut”.
  - The file should turn transparent.
  - Open My Documents and from the “Edit” menu choose “Paste”. This will *move* the file to my documents.
  - The LOG folder should now be EMPTY.

**If this is all too much for you, call John Miller to walk you through the process.**