

Offline Circulation Procedures
(Use when Polaris is not working.)

Revised June 26, 2006

Supervisors' Actions (RB initiates)

1. **RB** Advise all relevant supervisors of the situation.
2. **RB** Inform **PKG** at circulation immediately. (Inform EF if PKG not available.)
3. **RB** Assign TS Assistant for third circulation/phone/floor person immediately. If TS Assistant not available, tell PKG to assign and to ask Children's Staff to help with call numbers if necessary.
4. **PKG** Give circulation staff procedure attached or refer copy in to Policy & Procedures Manual. Post message via e-mail or bulletin board (if working).
5. **PKG** Tell stop discharging and tell where to store books.
6. **KY** Load new Polaris homepage with message. Load website alert.
7. **PKG** Check lookup shortcuts to training server are on circ desktops: <http://bpltrain/POLARIS>
8. **All** Maintain a positive attitude.
9. **RB** Fix the computer problem
 - a. Determine any temporary resources needed.
 - b. Permanent solution.
10. **PKG** Prepare for recovery staffing needed including staff to discharge and input.

Public Service/Circulation Staff Information (PKG Initiates)

- Computer system temporarily down – we expect it back up _____.
- Don't discharge anything – hold _____.
- Post signs on OPACs. (Supply of signs enclosed.)
- Post notes on carts not to shelve. (Supply of notes enclosed.)
- Tell patrons our computer system is temporarily out of order but that we will process their need when it is back up and that patrons will not incur fines because of this.
- Use the link to the Training Server to look up items – not current but helpful. Use the Catalogs of Other Libraries link from staff menu if necessary to give idea of call numbers.
- Use the Bookmobile feature (instructions attached) as possible. Use Wordpad/Notepad (instructions attached) as necessary.

Working Offline Using the Polaris Bookmobile

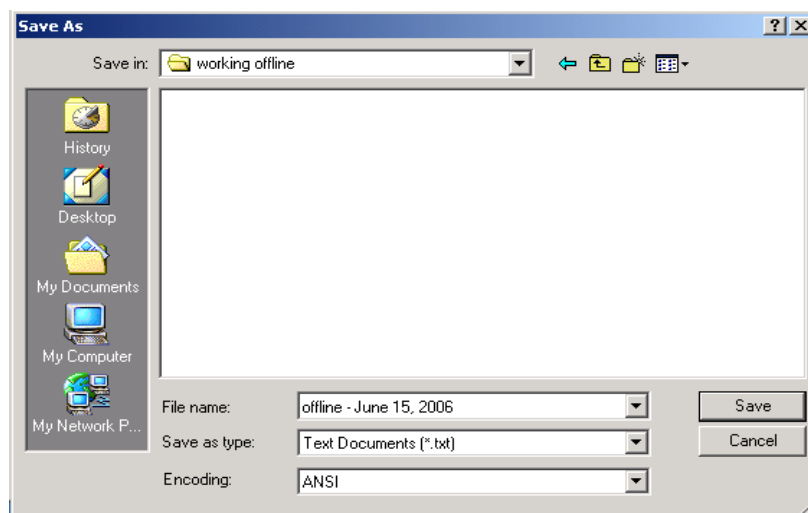
Revised June 26, 2006

1. Use only the two “front” circulation computers (Staff8 and Staff9 AKA Circ3 and 4).
2. Designate one computer for patron registrations, and mark it with a sign. (both computers can be used for check-out)
3. Log off regular Polaris.
4. Click the Polaris icon on the desktop. When you get the sign-in box, do NOT put in your password, but click the “offline” button.
5. You may now check patrons out (providing they have their card), and register new patrons (using only the designated computer)
6. For patrons without their cards, use Notepad (instructions below). You may also note renewals and questions in notepad.
7. Register patrons exactly as you would online, however the offline mode has no zipcode lookup or duplicate check.
 - a. Be sure to select the country before you enter the zipcode
 - b. Fill out the rest of the address information
8. Log out of Polaris once an hour to save files.

Using Wordpad /Notepad while working offline

June 15, 2006

- Open WordPad/notepad – icon is on desktop
- Go to file
- Go to save as
- Using the drop down menu choose **working offline** on desktop
- Name the file as follows – **offline – date** - see example below



- On the WordPad/notepad blank sheet type in **patron name and phone number**
- **Scan** in all **items** being checked out
- You may include any notes to be accessed at the time of input – such as renew all items, check out items for 21 days, etc.
- Use the **save** icon or file/save, **after each completed transaction**
- Continue to use the same notepad document making sure to **save after each completed transaction**
- **Print** notepad entries at the **end** of the **workday**.
- At the end of the day place the printed sheets into the folder, at the circ desk labeled **Offline work**.

- If you wish to start a new word pad document on the same day, follow the directions as above changing the filename to indicate a second sheet for the same day, i.e.,
 - Offline 2 – June 15, 2006
 - Offline 3 – June 15 2006
- If it is necessary to work offline for more than one day, begin the second day using this process of naming with the correct date.
- Reader's Services Coordinator will collect the sheets for input into the Polaris system.

Recovery Procedures

RB uploads bookmobile(s) – instructions below.

PKG processes/inputs notepad information.

PKG coordinates discharges using date of computer breakdown.

PKG take signs off OPACs.

KY restores website homepage, OPAC customization.

- - - - -

For RB:

To upload files:

1. Once Polaris is running again – DO THIS FIRST -- before you go back in business.
2. Go to the computer designated for patron registrations first. Log back on Polaris using the password. Go to the circulation red orb, and click on the little car (in dropdown menu, it is called “bookmobile”).
3. You will get a box with two areas. Assign number of free days, if the system has been down awhile.
4. Highlight several files. Click “upload file”. Repeat until all are uploaded.
5. Any errors will appear in the bottom box. Most will be things like patron owes money, or whatever stop is on their card. Any that do not appear to be mundane, try to figure out what went wrong with the check-out or check-in.
6. Repeat #2-5 for the other computer.

Once both computers have been uploaded you are ready to roll!

Catalog is temporarily out of order. Please ask library staff for assistance in finding books.

We apologize for the inconvenience.

Sign for OPACs

Do Not Shelve

Do Not Shelve

Do Not Shelve

Do Not Shelve

Do Not Shelve

Sign for shelve to put on carts not yet checked in 