



Evergreen 2.7.2 Standalone Client Procedures

Questions?

Contact the PINES staff by putting in a Help Desk ticket or calling 404-235-7210.

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Introduction

There are times when the full PINES functionality is unavailable – during a PINES upgrade or unexpected outage, or when the library’s Internet or local network service goes down.

Rather than shutting down all circulation operations or trying to track checkouts on paper, you can use the Evergreen Standalone Client to process checkouts. It has several advantages over the paper method, namely: 1) you can use your barcode scanner to reduce typing errors and save time, 2) it will alert you to some patron problems such as blocked or expired cards, and 3) it will print out receipt slips.

Although the Standalone Client does give you options to do renewals and register new patron accounts and do checkins, **it is generally only advisable within PINES to use it for checkouts**. Checking items in using the Standalone Client does not mark them in transit or catch hold requests, so it is best to wait to do checkins until after the full system is back online. Likewise, if you use the Standalone Client for renewals, it does not recognize how many renewals it has already had or if it is on hold for another patron.

One-Time Setup

Receipt Printer

Be sure to set up a receipt printer before using the Standalone Client for the first time (Admin > Workstation Administration > Printer Settings Editor > Choose “Offline” for the Printer Context, then set your default printer up and print a test page). This only needs to be done once per workstation. If the workstation does not have a receipt printer set up for offline transactions and you try to print receipts from it, you will get a *print_tree* error.

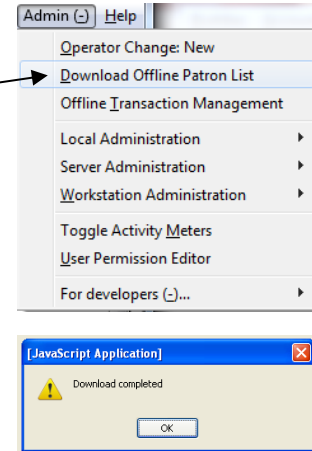
Receipt Templates

There are several receipt templates the Standalone Client uses: *offline_checkin*, *offline_renew*, *offline_inhouseuse*, and *offline_checkout* – if you are only using the Standalone Client for checkouts, then the ***offline_checkout*** template is the only important one to modify. As with all other receipt templates, whatever changes you wish to make will need to be made on every Circulation workstation where the Standalone Client will be used.

Daily Task: Downloading the Offline Patron List

To be prepared at all times to run the Standalone Client, *the offline patron list should be downloaded daily*. This download captures up-to-date patron information including new patrons that have been added since the last download, blocked patrons, expired patrons, etc. (If you do not download the offline patron list daily, you can still use the Standalone Client, but you will see more errors when you do the upload.)

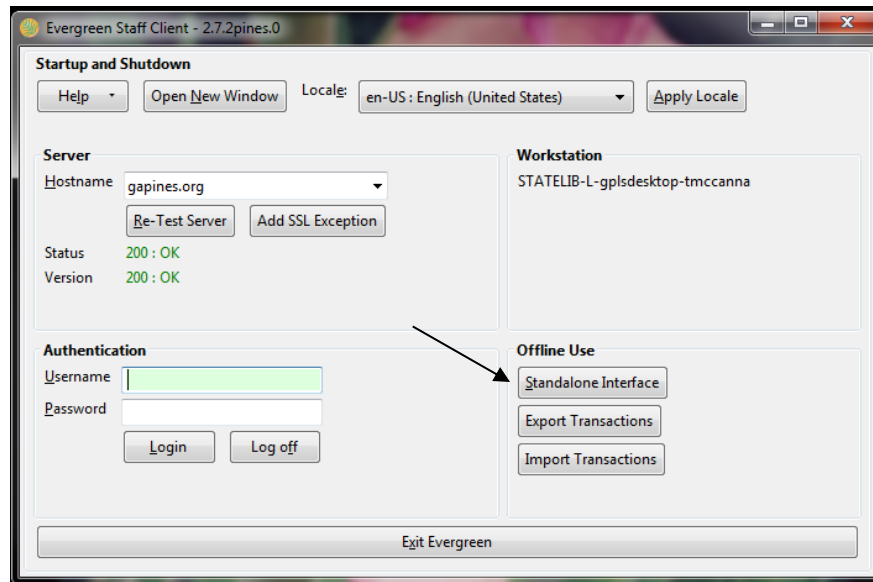
1. Log in to the **Evergreen Staff Client**.
2. Click **Admin**.
3. Click **Download Offline Patron List**.
4. Proceed with other work.
5. When the download is complete (this may take several minutes), a 'Download completed' message will appear.
6. Click **OK** to close.



This needs to be done on each Circulation machine that may need to use the offline functions.

Starting the Standalone Client

Click the Standalone Interface button on the Evergreen Client login screen.



Checking Out Items Using the Standalone Client

You should only use the Standalone Client to check books out. **Do not use the Standalone Client to create new patron accounts, place holds, do renewals, etc.**



1. Press the **Check Out** button to begin.
2. Make sure the **Check barcode?** boxes and the **Print receipt?** box are all checked.
3. Enter patron's barcode.
4. Make sure the item due date is correct.
5. Scan the first item's barcode and press the **Enter** button. (The item will appear on the right-hand side of the screen.)
6. Repeat step 5 for each item being checked out.
7. Check the **Print receipt?** box.
8. Click the **Save these transactions** button.

Standalone Check Out

Step 1) Check today's date above.

Step 2) Enter the patron's barcode:

2011-09-23

Check barcode?

Step 3) Enter the item due date:

2011-09-23

or choose one of these

Step 4) Enter the item barcode:

31012002917092

Enter

or choose a non-barcoded option...

Check barcode?

Step 5) Repeat Steps 3 and 4 until done.

Step 6) Finish

Print receipt? ...

Cancel Save these transactions

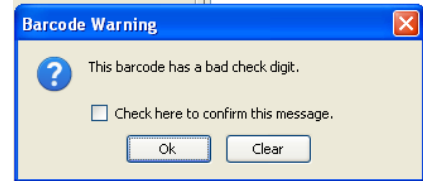
What If You Enter a Bad Barcode?

If you enter a bad item barcode and it appears on the right-hand side of the screen, you must either click the Cancel button or exit the Standalone Client and start it up again. (There is a **Delete Selected Transaction** button, but it does not work.)

Pop-Up Error Messages

Pay attention to the various pop-up messages and act accordingly. In order to clear the pop-up message, you will need to check the "Check here to confirm this message" box and press the Ok button. Here are some examples of pop-up messages you may receive.

This patron has a bad check digit or This barcode has a bad check digit: This means the barcode was entered incorrectly. Confirm the message and re-enter the barcode.



This barcode was flagged Expired:

The patron's card has expired. Check the patron's ID and write down his or her current information (barcode number, name, address, phone, etc.) on the Expired Cards form. Write

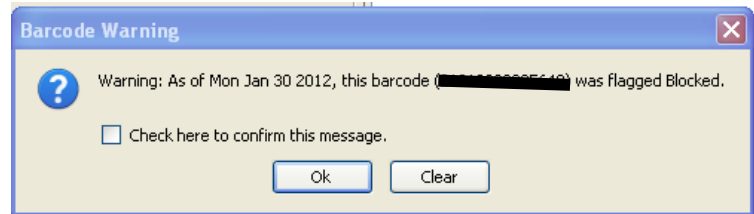
down the barcode number of each item to be checked out. After PINES is back online, the patron's account will need to be updated and then the items checked out to them.



This barcode was flagged Barred or This barcode was flagged Blocked:

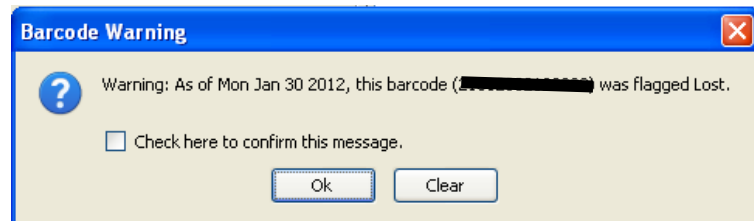
The patron's account has been barred from use for some reason – possibly because of overdue fines, lost card, misuse of account, or other reasons. We cannot determine why the account was barred until PINES is back online.

Do not check the items out to the patron. You may offer to place the items on hold and they can come back when PINES is back online to resolve the problem with the account.



This barcode was flagged Lost:

The card has been marked lost. As we cannot determine the full history of the card until PINES is back online, do not check the items out to the patron. You may offer to place the items on hold so they can come back when PINES is back online to resolve the problem with the account.

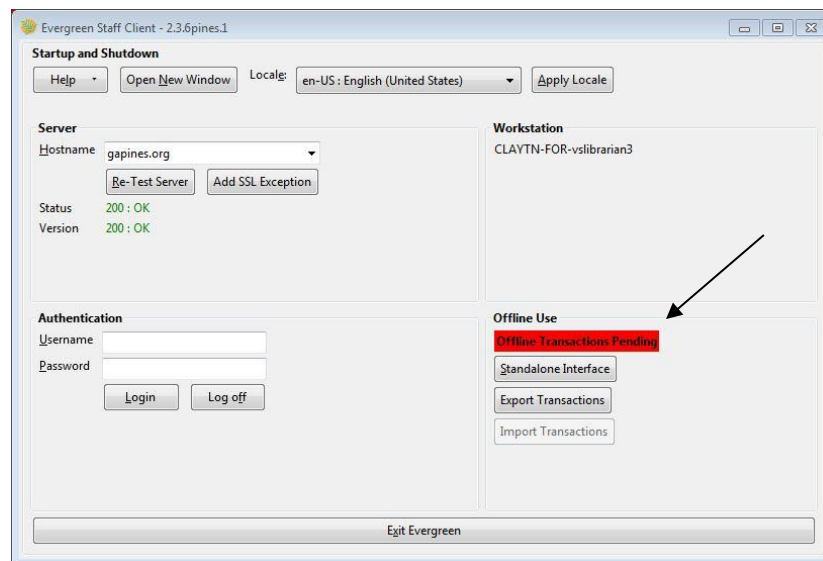


Uploading and Processing Transactions

When access to PINES returns to normal, the transactions for each machine used to process standalone check outs must be uploaded following these directions. If you do not upload these files in a timely manner (ideally, within a few hours of when PINES comes back online), they will be uploaded at a later date the next time the Standalone Client is used, and that can create numerous serious problems with patrons being billed inaccurately for long overdue/lost items and these problems are very difficult to pinpoint and repair.

Uploading transactions is a three-step process – Uploading, Processing, and Correcting Errors. This must be done on each workstation that performed standalone transactions (you may use the normal staff login). The Upload step can be done by Circulation staff, but the Process step must be done with a Library Manager or LocalAdmin account.

If a workstation has pending transactions that have not been uploaded, you will see a “Offline Transactions Pending” message on the login screen. This message will go away once the Upload process is complete and the staff client is restarted.



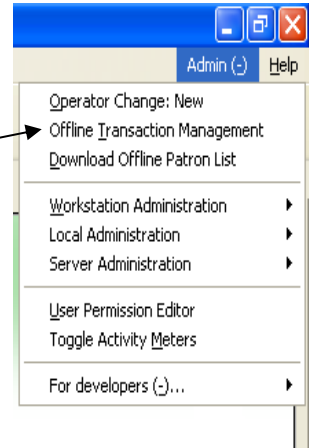
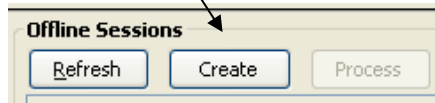
If you need to review the offline transactions before uploading them, especially if you see this message on a workstation that you were not aware had used the Standalone, you will need to find the text files that the offline transaction information is stored in. These text files can be opened in Notepad if you wish to review the data. In Windows 7, the location is:

```
C:\Users\USER
NAME\AppData\Roaming\OpenILS\open_ils_staff_client\Profiles\RANDOMLETTERS.default\chrome\pending_xact_#####
```

If you are unable to upload & process the transactions, submit a help desk ticket to the PINES staff and attach this file. Be sure to attach it directly from its location, and do not open and re-save it, because many programs add line breaks to text files upon saving that interfere with the processing.

Part 1: Upload

1. Log in to the **Evergreen Staff Client**.
2. Click **Admin**.
3. Click **Offline Transaction Management**.
4. Click the **Create** button.



5. Enter a description for the day's uploads for your branch (example: *Morrow 10-27-2015 Circ 1*)
6. Click on the entry that you created in step 5.
7. Click the **Upload** button.

Part 2: Process

(This part must be done while logged in as a Library Manager or LocalAdmin.)

1. Click **Admin**.
2. Click **Offline Transaction Management**.
3. Choose the entry that was created in the previous section.

	Choose relevant entry	# computers uploaded	# checkouts	Completed yet?
Offline Sessions				
<input type="button" value="Refresh"/> <input type="button" value="Create"/> <input type="button" value="Process"/> <input type="button" value="Upload"/>				
Description	Date Created	Upload Count	Transactions Processed	Processing?
File from L3 01/24/2012 Network Upgrade	2012-01-24 11:44	1	113	Completed
Catching Anything That Hasn't Been Processed	2012-01-23 19:17	1	2	Completed
Upgrade List	2012-01-18 14:37	0	0	No
update for circ04-old	2012-01-17 12:51	1	305	Completed
update 01-12 thru 01-17	2012-01-17 12:28	4	623	Completed
...	-	-	..

4. Click the **Process** button.
5. It will take several minutes to process all the transactions. Click the **Refresh** button to see if it has completed.
6. Once it has completed, check for errors (next step).

If the file will not process, please put in a Help Desk ticket with the branch, the date and name of the upload file you created in Part 1, Step 4, and the original transaction file attached from this location:

C:\Users\USER
 NAME\AppData\Roaming\OpenILS\open_ils_staff_client\Profiles\RANDOMLETTERS.default\chrome\pending_xact_#####

Part 3: Correct Errors

If any errors are generated during the upload process, they will be stored in a file that you can export or print to make manual corrections. To view the error list:

1. Select the relevant entry.
2. The generated errors will appear on the lower half of the screen:
3. Look up each patron record that shows an error and make the necessary corrections.

Exceptions for 04-13-11 update					
All transactions from this session have been processed. The errors, if any, are listed below.					
Export List		Print Export			
Workstation	Timestamp	Type	Event Name	Item Barcode	Patron Barcode
CLAYTN-HQS-HQCIRC3New	2011-04-14 11:29	checkout	OPEN_CIRCULATION_EXISTS	31012003137930	██████████
CLAYTN-HQS-Circ04	2011-04-14 09:19	checkout	PATRON_ACCOUNT_EXPIRED	31012003132956	██████████
CLAYTN-HQS-Circ04	2011-04-14 09:19	checkout	PATRON_ACCOUNT_EXPIRED	31012003243365	██████████
CLAYTN-HQS-Circ04	2011-04-14 09:19	checkout	PATRON_ACCOUNT_EXPIRED	31012003110150	██████████
CLAYTN-HQS-Circ04	2011-04-13 19:26	checkout	COPY_IN_TRANSIT	31027005960691	██████████

Common error messages:

- **ACTOR_CARD_NOT_FOUND** - Indicates the patron's library barcode was mis-scanned/ mis-typed. Attempt to correct it if you can determine the error, but that may not be possible. This error should be very rare as long as the Circulation Staff are paying attention to the pop-up error messages while using the Standalone Client.
- **ASSET_COPY_NOT_FOUND** - Indicates the item barcode was mis-scanned/mis-typed. Attempt to correct it if you can determine the error, but that may not be possible. This error should be very rare as long as the Circulation Staff are paying attention to the pop-up error messages while using the Standalone Client.
- **CIRC_CLAIMS_RETURNED** - Indicates a book previously marked as claimed-returned was found and checked out. Check the current patron to be sure it is checked out correctly, and check the item's history to make sure any erroneous messages or fines are removed from the prior patron's account.
- **COPY_IN_TRANSIT** – Indicates a book was checked out that had been marked as in transit. Check the patron to make sure that the book was checked out correctly to his or her account.
- **COPY_STATUS_LOST** - Indicates a book previously marked as lost was found and checked in.
- **MAX_RENEWALS_REACHED** – You should not see this error because renewals should not be done on the Standalone Client.
- **OPEN_CIRCULATION_EXISTS** - Indicates a book was checked out that had never been checked in. This is not usually an issue because the book should usually appear on the patron's account correctly even though the error appears on this list. However, you should look up the item's history to be sure that it is showing up correctly and no longer indicates that it is checked out to the previous patron.
- **PATRON_ACCOUNT_EXPIRED**: If you are downloading the offline patron list on a daily basis, and if the Circulation Staff are paying attention to the error messages that pop up while using the Standalone Client, you should rarely see this error. On the occasions you do see it, go into the patron's account and renew their card for a day. Then, make a note in the patron's account to renew their card the next time they are in the library and check out the items to that card.

Potential problems that may not generate errors:

- Checking out an item with an incorrect borrowing time.
- Attempting to re-check out an overdue book.
- Checking out a reference book.
- Checking out an item belonging to another library.
- Checking out a book on hold for another patron.

Part 4: Delete Old Standalone Files

After your offline transactions have been uploaded, processed, and checked, we recommend that you delete the text files from the computer. This will help to prevent any confusion related to future offline transactions.

Windows 7:

C:\Users\USER

NAME\AppData\Roaming\OpenILS\open_ils_staff_client\Profiles\RANDOMLETTERS.default\chrome\pending_xact_#####
#####.complete

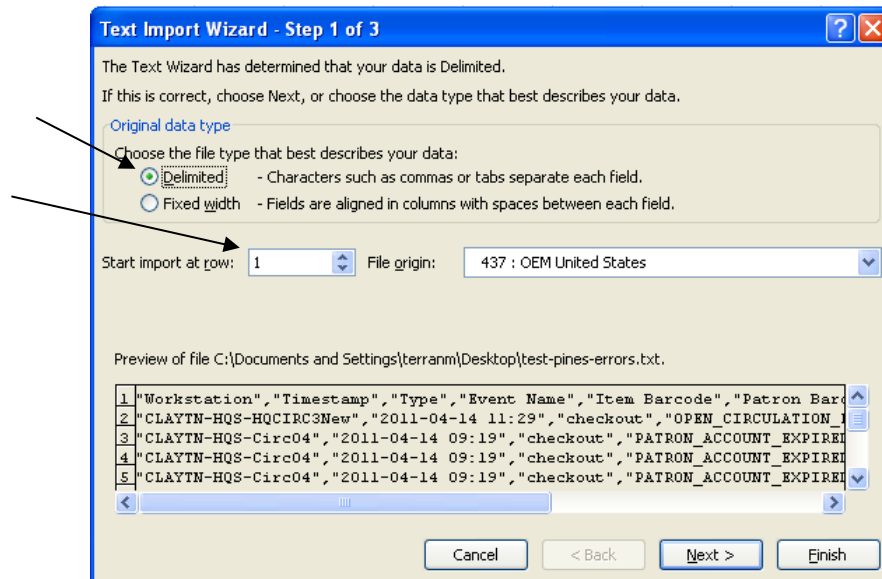
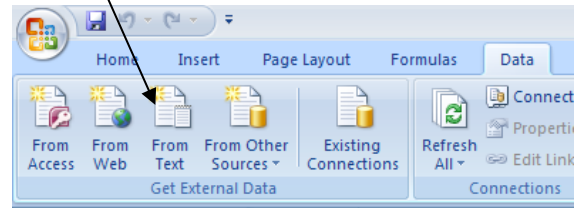
Exporting the Error List to Excel (Optional)

If you wish to export the error list so that it can be printed from Excel, follow these instructions:

1. From the transaction error screen in Evergreen, click the **Export List** button.

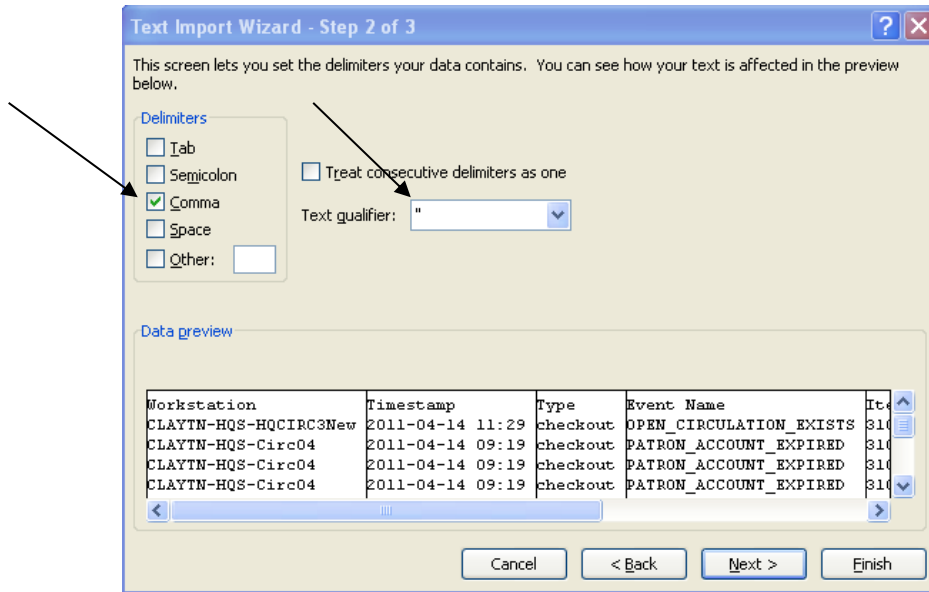
Workstation	Timestamp	Type	Event Name	Item Barcode	Patron Barcode
CLAYTN-HQS-HQCIRC3New	2011-04-14 11:29	checkout	OPEN_CIRCULATION_EXISTS	31012003137930	[REDACTED]
CLAYTN-HQS-Circ04	2011-04-14 09:19	checkout	PATRON_ACCOUNT_EXPIRED	31012003132956	[REDACTED]
CLAYTN-HQS-Circ04	2011-04-14 09:19	checkout	PATRON_ACCOUNT_EXPIRED	31012003243365	[REDACTED]
CLAYTN-HQS-Circ04	2011-04-14 09:19	checkout	PATRON_ACCOUNT_EXPIRED	31012003110150	[REDACTED]
CLAYTN-HQS-Circ04	2011-04-13 19:26	checkout	COPY_IN_TRANSIT	31027005960691	[REDACTED]

2. A pop-up window will appear that says that the errors have been copied to your clipboard – click the **OK** button.
3. Open **Notepad** (Start Menu > All Programs > Accessories > Notepad).
4. Paste the error list contents (**CTRL-V**).
5. Save it to your desktop as a **plain text (.txt)** file.
6. Open **Microsoft Excel 2007** (you may use a different version of Excel, but the tabs/dropdowns will be slightly different).
7. Switch to the **Data** tab.
8. Click the **From Text** icon
9. **Select** the file you created in step 5.
10. In the pop-up box, select **Delimited** for the Original Data Type and **Start import at row: 1**.



11. Click **Next**.

12. Choose **Comma** as the Delimiter and double **quotation marks (")** as the Text Qualifier.



13. Click **Next**.

14. On the next window, click **Finish**.

15. On the next window, click **OK**.

16. The pop-up window will close and the data should now appear in your Excel worksheet.

17. You will notice that the item & patron barcode fields do not appear properly. **Select** all of these fields and **right-click on the selection**.

18. Choose **Format Cells**.

19. On the Number tab, choose **Number** as the category with **zero (0) decimal places**.

20. Click **OK**.

21. Optional: You may wish to sort the errors in order by the patron barcode number.

22. You may now save and/or print the file.