

## Polaris Offline: Using Local Offline

Local offline is used when staff are unable to connect to the terminal server (typically due to an Internet outage).

### Checkout Procedures

To access Polaris offline, open the Polaris Offline icon.

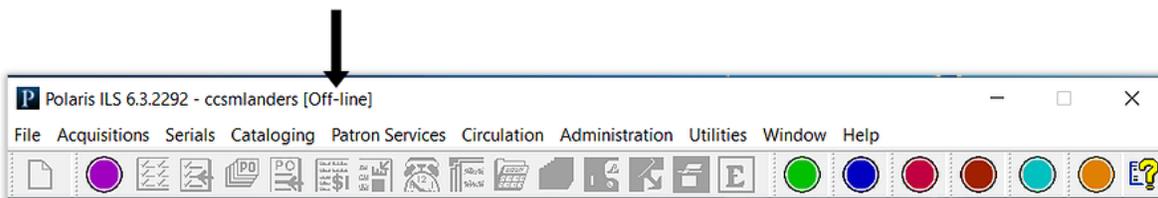


Enter your username in the User name field. Check the "Work off-line" box. You do not need to enter your Polaris password.

A screenshot of the 'Polaris Log On' dialog box. It has a title bar with a close button. The dialog contains the following fields and options:

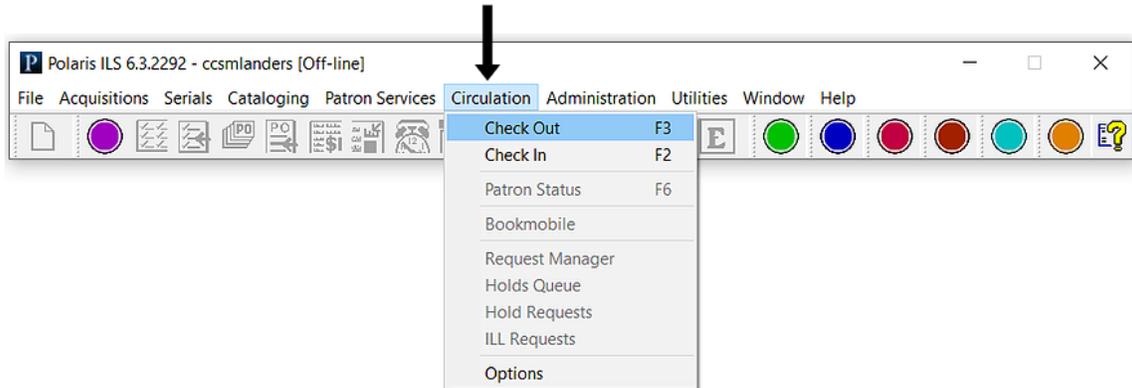
- User name: A text box containing 'polarisusername'.
- Password: An empty text box.
- Domain: C CSLIB
- Use Windows Authentication: An unchecked checkbox.
- Work off-line: A checked checkbox, with a black arrow pointing to it from the left.
- OK and Cancel buttons are on the right side.

The title bar will indicate you have successfully logged in to Offline. Most functions will be grayed out and unavailable to staff.

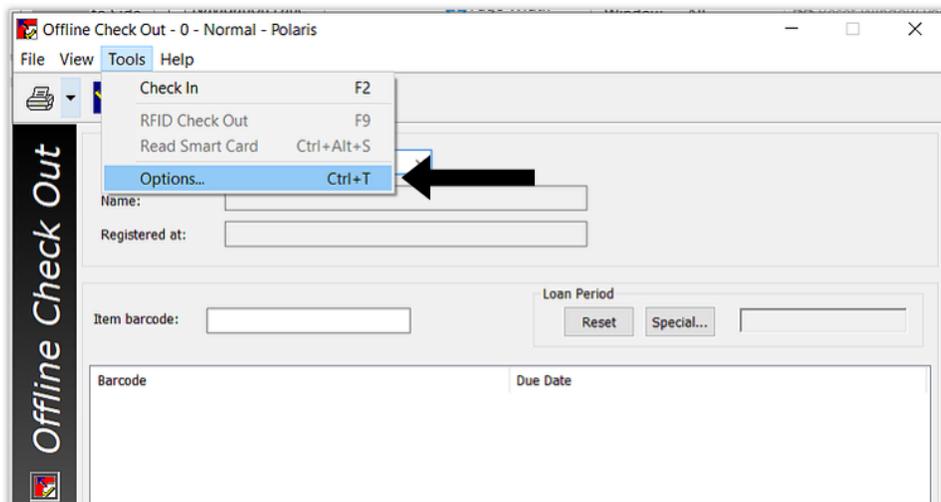


To check out materials, open the Circulation menu. Select Check Out.

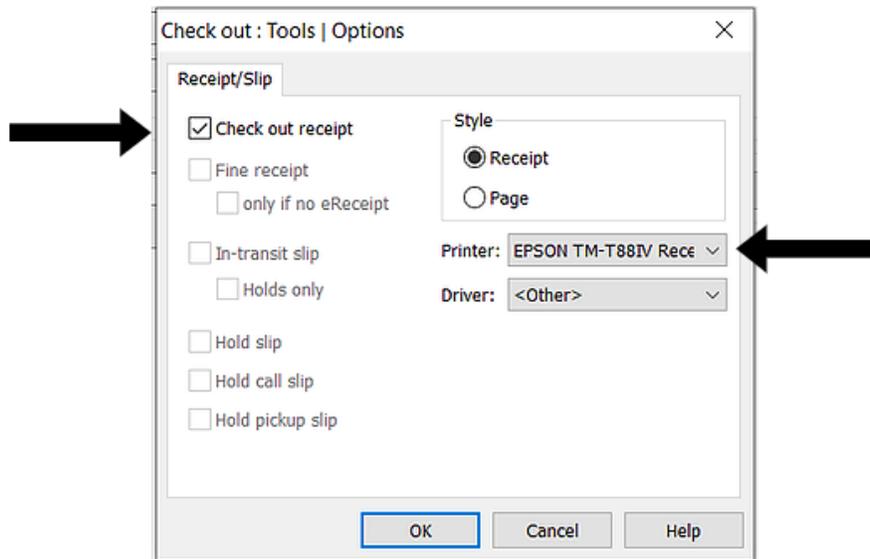
**\*Note: While "Check In" is available for staff to select, do not check in materials on offline.**



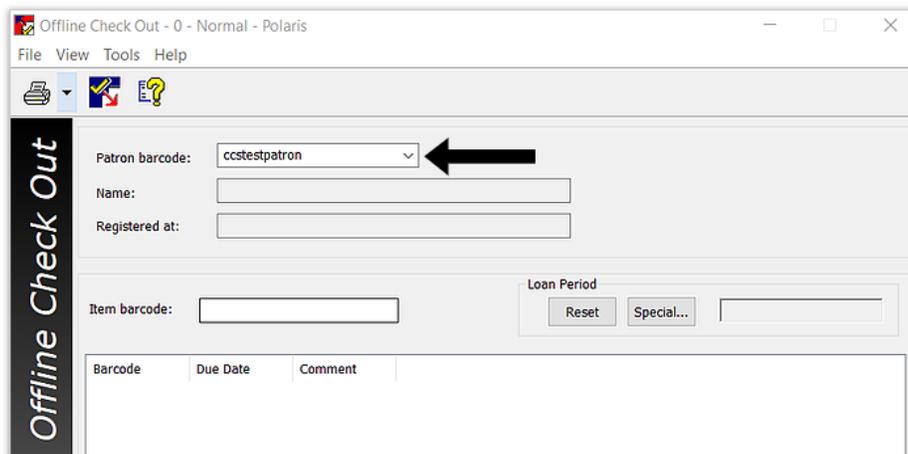
Prior to checking out any materials, select the Tools tab and click "Options."



Select "Check out receipt" and choose the correct printer and driver from the drop-down Printer list. Click OK.



To checkout, scan or key in the patron's barcode in the "Patron barcode" field. Be careful to enter in the barcode correctly. Polaris offline will not be able to identify invalid patron barcodes. Once the barcode is scanned or keyed in, press enter.



If the patron's record exists in the offline DBM files stored on your computer, the patron's name and library will populate those fields. Patrons who have registered for a library card since your offline files have been updated will not have their information display.

Patron barcode: ccstestpatron

Name: CCS Test Patron

Registered at: Cooperative Computer Services

A window with patron blocks may appear. Library staff can select Yes to continue checking out materials.

Debra

Registration Has Expired  
Address Check Required

Do you want to continue with this operation?

 Yes No

Type or scan the item's barcode in the "Item barcode" field.

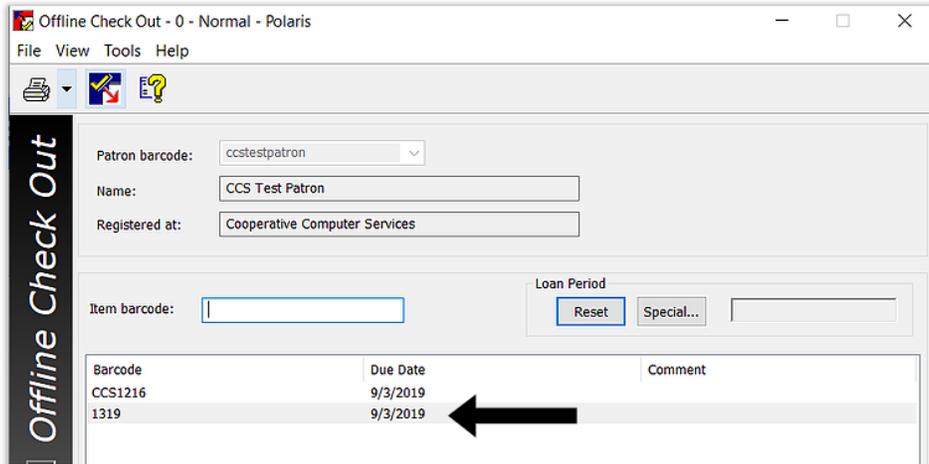
Patron barcode: ccstestpatron

Name: CCS Test Patron

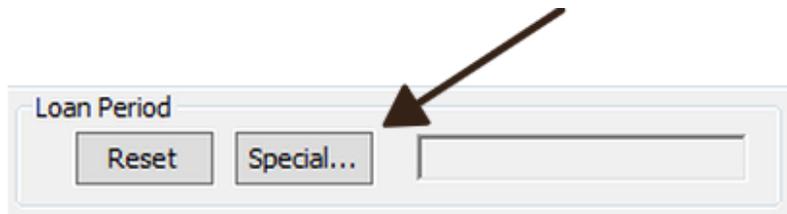
Registered at: Cooperative Computer Services

Item barcode: 1319 

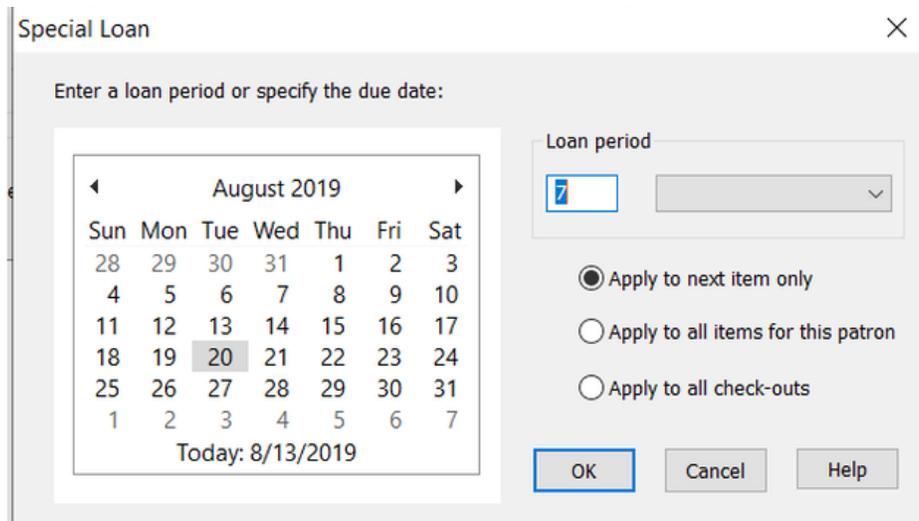
If you do not adjust the due date using the Special button, the item will check out for the library's default checkout period (21 days in most instances).



To adjust due dates, click "Special" **before** checking the item out. (Due dates of items already checked out cannot be modified).



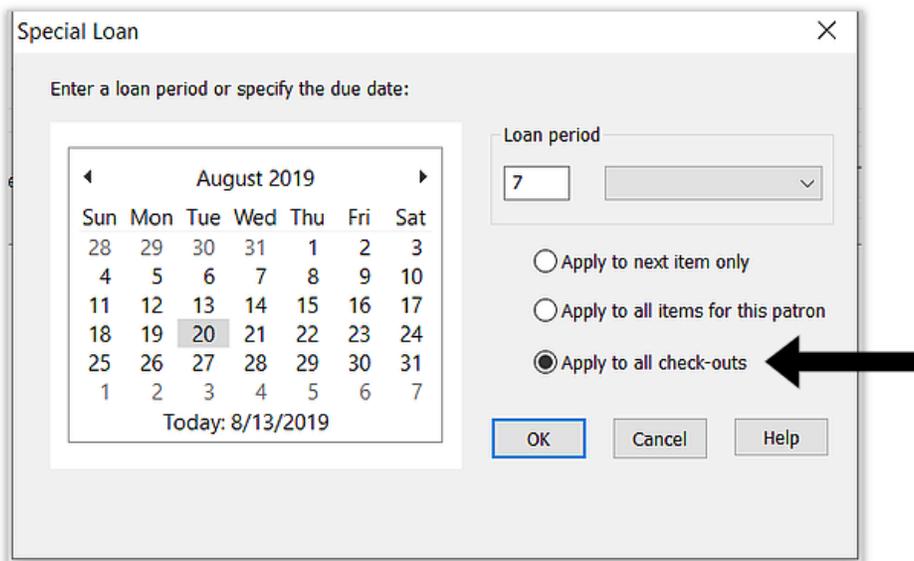
Modify the due date by selecting a new date from the calendar on the left or change the loan period value using the drop down menus on the right.



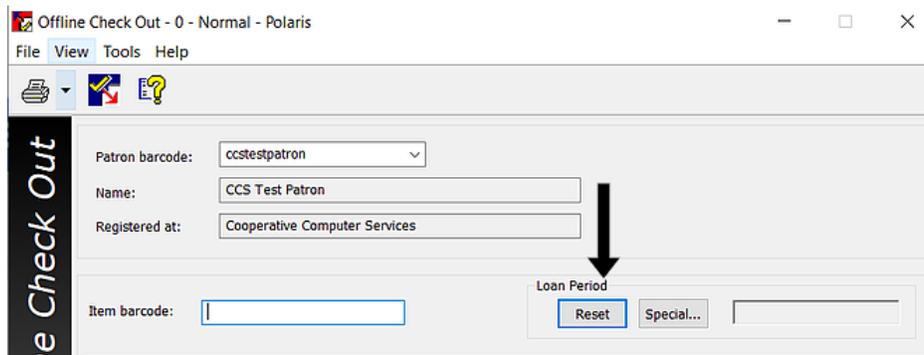
Next, decide if you want the adjusted loan period to:

- Apply to the next item only. After the next item is checked out, the loan period will go back to the default
- Apply to all subsequent items checked out to this patron. After the patron's checkout is completed, the loan period will go back to the default
- Apply to all check-outs moving forward; the adjusted loan period will be applied to all checkouts until reset

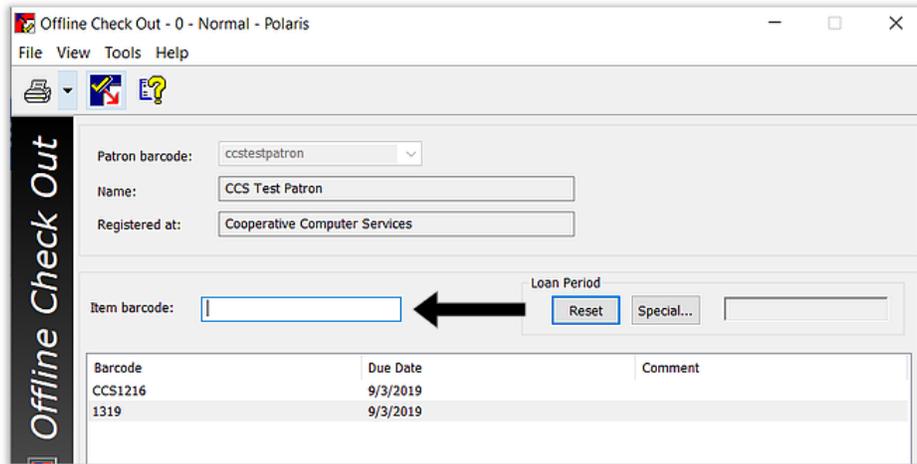
If you select **Apply to all check-outs**, the adjusted due date will continue to be applied to all items moving forward.



This change will continue to be applied to all subsequent patrons until the "Reset" button is clicked. Selecting the Reset button will reset the due date to the default.



Once all items have been checked out to the patron, **place your cursor in the empty "Item barcode" field and click the Enter key.**



This will complete the transaction for the current patron and prompt a checkout receipt to print.

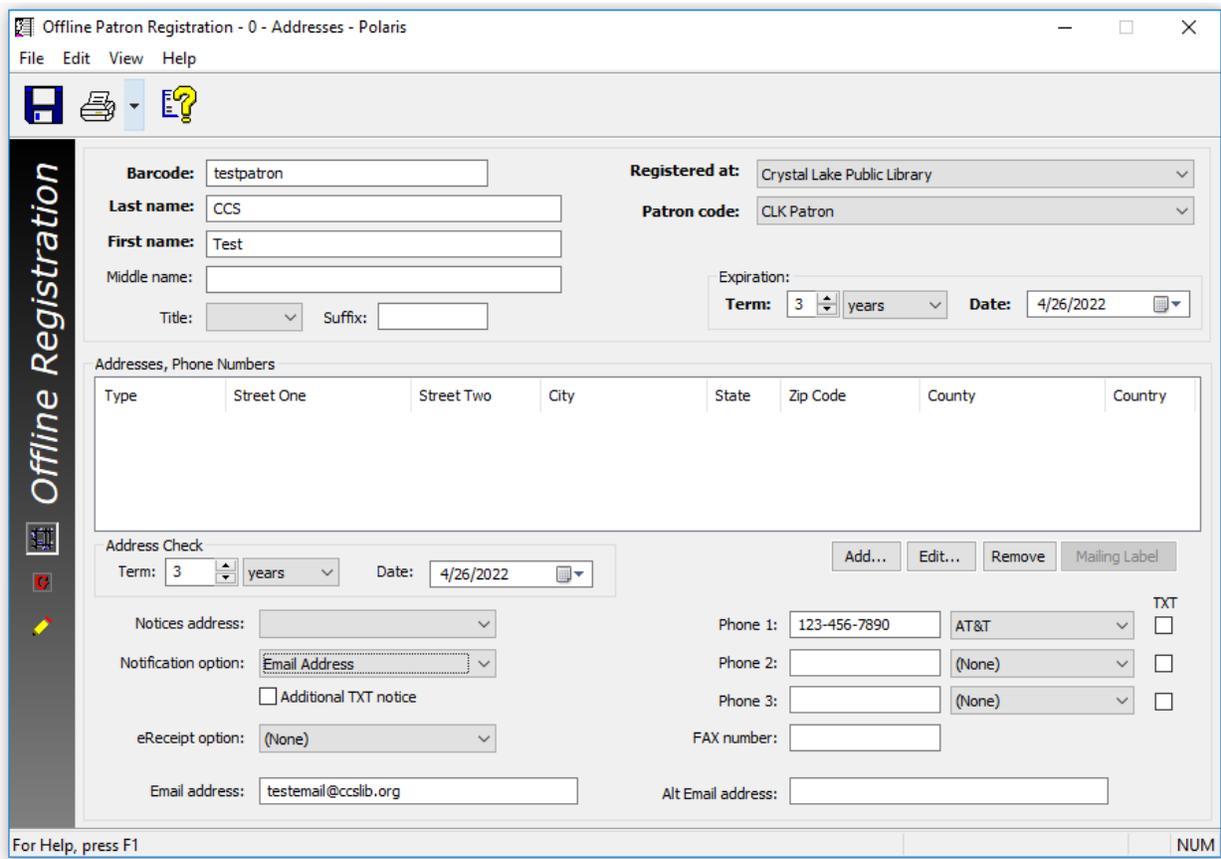
**\*Note: Selecting the "Print" button will print the entire screen, rather than just the checkout slip.**

# Patron Registration

To register a new patron, open the Patron Services tab and select Patron Records.



Complete the patron registration workform with all patron information.



**Offline Registration**

Barcode: testpatron  
Registered at: Crystal Lake Public Library  
Last name: CCS  
Patron code: CLK Patron  
First name: Test  
Middle name:   
Title:   
Suffix:   
Expiration: Term: 3 years Date: 4/26/2022

Type	Street One	Street Two	City	State	Zip Code	County	Country
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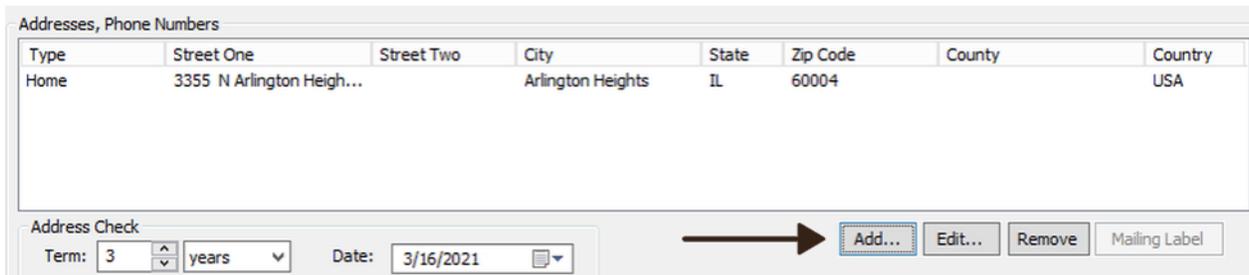
Address Check: Term: 3 years Date: 4/26/2022

Notices address:   
Notification option: Email Address   
 Additional TXT notice   
eReceipt option: (None)   
Email address: testemail@ccslib.org

Phone 1: 123-456-7890 AT&T  TXT   
Phone 2: (None)    
Phone 3: (None)    
FAX number:   
Alt Email address:

For Help, press F1 NUM

To add an address, select the "Add" button underneath the address window.



Type	Street One	Street Two	City	State	Zip Code	County	Country
Home	3355 N Arlington Heigh...		Arlington Heights	IL	60004		USA

Address Check: Term: 3 years Date: 3/16/2021

→ Add... Edit... Remove Mailing Label

Complete the patron's address fields and click ok.

**Add/Edit Address**

Address:

Type: Home

Country: USA

Postal code: 60004

Street 1: 3355 N Arlington Heights Rd

Street 2:

City: Arlington Heights

County:

State/province: IL

OK Cancel

Once all fields are filled out on the Address and Phone tab, click the General tab to complete additional information, such as stat class, birth date, and more.

**\*Note: ILL/RB Library Code is a required field. Select your library from the drop-down list. If you are registering a reciprocal patron, select that patron's home library.**

**Offline Registration**

Barcode: 1234567890

Last name: Test

First name: Patron

Middle name:

Title: Suffix:

Registered at: Cooperative Computer Services

Patron code: Reciprocal Patron

Expiration: Term: 3 years Date: 4/13/2021

General

Gender: Male Female N/A

Statistical class: (None)

Password:

Language: English

Former barcode:

Birth date:

Date of original registration: 4/13/2018

Last activity date:

Exclude from notices and reminders:

Overdue Almost overdue/auto-renew

Hold Patron record expiration

Billing Inactive patron

Exclude from collection agency

Maintain reading history

E-mail notices in plain text

Do not delete patron record

User defined fields

Parent/Guardian

Drivers License

Language Spoken at Home

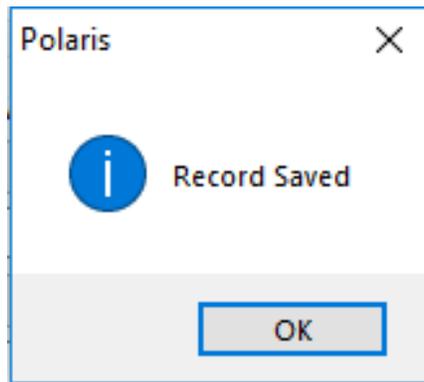
ILL/RB Library Code

Internet Access

Once all fields are filled out, click the save button.

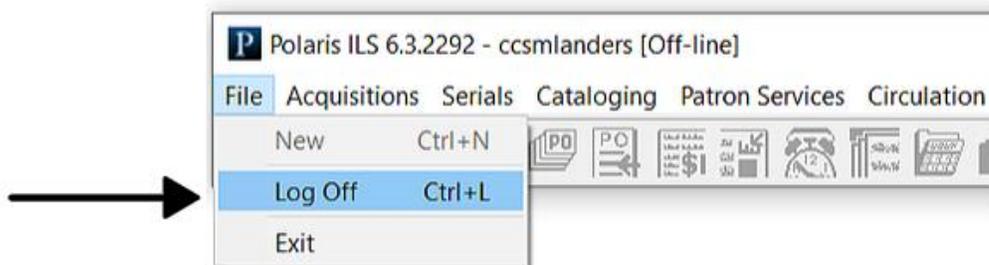


You'll receive a notification that the patron record has been saved.

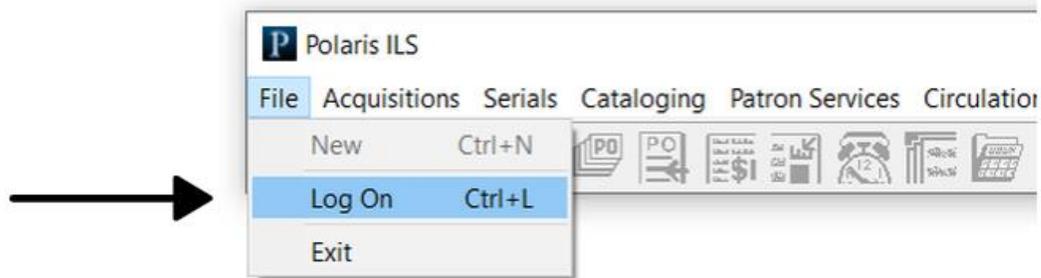


## Logging Off

Library staff should log off of Polaris every 2-3 hours. To log off, select **File** and **Log Off**.



To log back in, select **File** and **Log On**.



At the end of the day, log off, and **click Exit**.

