Polaris Offline:

Using Remote Offline

Remote offline is used when staff are able to connect to the terminal server, but Polaris is down or not working properly.

Checkout Procedures

To access Polaris offline, open the Polaris Production icon.

If prompted, log in to the terminal server with your designated terminal server login and password. Remember, only one person can be logged into a given terminal server at a time.
Enter your username in the User name field. Check the "Work off-line" box. You do not need to enter your Polaris password.

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 (unless they are non-holdable, in-house only materials that have hourly checkouts. This is optional)
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 the terminal server, the patron's name and library will populate those fields. (Patrons who have registered for a library card since the offline files have been updated will not have their information display.)

A window with patron blocks may appear. Library staff can select Yes to continue checking out materials.
Type or scan the item's barcode in the "Item barcode" field.

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.

To add an address, select the "Add" button underneath the address window.
Complete the patron's address fields and click ok.

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.
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.