

## Upgrade to Evergreen 2.2 Instructions

### **Monday, August 6 – Friday, September 14: Inform local library staff and patrons**

Use the [Upgrade Notice patron flyer template](#) found on the [Member Resources website](#) to begin informing your patrons of what they will NOT be able to do. Customize the flyer template to your liking.

### **Monday, August 6 – Friday, September 14: Train staff on using offline mode**

Please review the [Circulation Training Manual, Chapter 9 – Standalone Mode](#) on the [Staff Training Documents](#) website with your staff members before the upgrade begins.

- 1) Also available is a tutorial on [Uploading Offline Transactions](#).
- 2) Reach out to your regional coordinator or the Evergreen Indiana Coordinator with any questions.

### **Friday, September 14 (8PM) – Sunday, September 16 (8PM): Run in offline mode**

During the upgrade window, please run in standalone mode or checkout on paper until you are notified that the upgrade is complete via all four evergreen listservs. Remember: Do not check-in or register new patrons in the standalone mode.

- 1) Please note that while the servers are down for the upgrade and libraries are operating in offline, the SIP connections (for non-eIndiana OverDrive libraries, PC Reservation, etc.) will also be down. We apologize for this inconvenience.
- 2) eIndiana Digital Consortium members will NOT have an interruption in service as OverDrive has offered to allow authentication through their temporary login mode. If any issues are experienced with OverDrive at eIndiana Digital OverDrive libraries, please click on the Support tab in Content Reserve and submit an issue to OverDrive directly.

### **Sunday, September 16 (Evening): Listserv message**

An email will be sent to all Evergreen listservs notifying everyone that the upgrade has been complete.

### **Monday, September 17 (Before business day begins): Accessing the 2.2 auto-update staff client and completing offline mode transactions**

- 1) [Chapter 1 of the Evergreen Indiana Circulation Training manual](#), Page 1-9 on the [Staff Training Documents website](#) contains instructions for accessing your auto-updating staff client. You should follow these instructions after the upgrade is complete but before your library opens for business.
- 2) Be sure to upload all offline transactions and process them before creating any live transactions on Monday morning. This is to ensure that there is no conflict between the offline transactions and any new database information. It is recommended that the offline transactions are completed before the library opens to the public for the day to avoid

mistakenly checking items in or out on the live server before uploading the offline transactions is complete.

- 3) Update all links to the OPAC and/or embedded search forms. See [Weekly Update – August 28, 2012](#) for more information.

**Monday, September 17 (Beginning of business day): Backdate checkins**

As you begin checking in items that were turned in over the weekend, be sure to backdate to avoid inappropriate overdue fines.