

# SIS offline

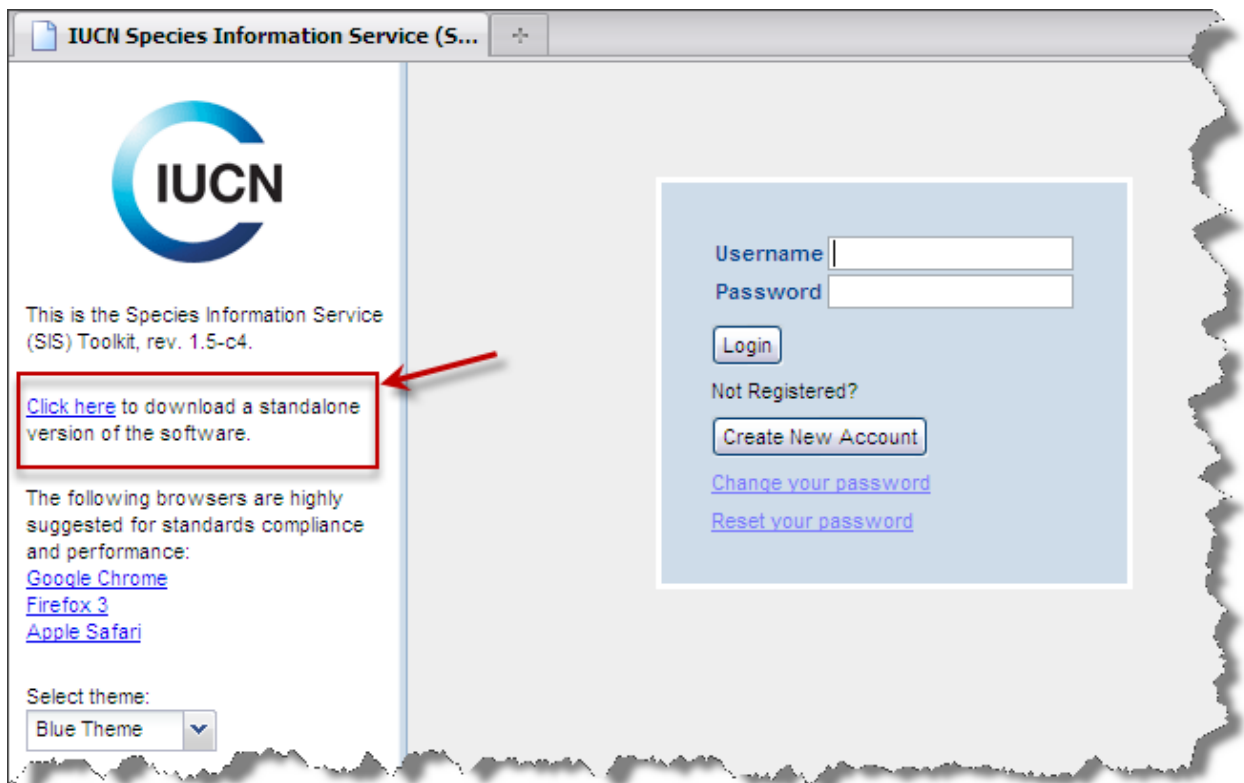
*We highly recommend using Firefox version 3.0 or newer with the offline SIS. Internet Explorer is specifically not recommended because of its noncompliance with internet standards.*

## Getting Started

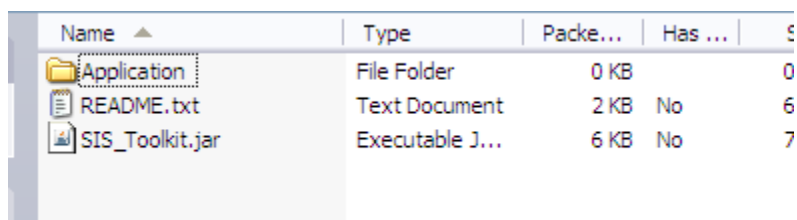
SIS offline doesn't really "install" on your computer the way normal programs do. The whole system runs from a file folder without the need to install it at all. You will, however, need to have a browser and a current version of the Java Runtime Environment (JRE), which can be downloaded for free from <http://www.java.com>

1. Visit <http://sis.iucnsis.org>

At the login page, notice the link to download the offline version on the left:



2. Click the link shown above, which will initiate downloading the standalone SIS toolkit (large file – please be patient). When finished, you will have a file named sisOffline.zip stored on your hard drive. By default, browsers may place downloaded files on the desktop or in a special “downloads” folder; as a result, you may need to search for the zip file once downloaded.
3. Locate the downloaded zip file and unzip it to a location you will remember (the desktop is a fine temporary place, or MyDocuments). Windows has a built-in tool for unzipping, or *extracting*, the contents of a zip file. Simply right click on the zipped file and select “Extract all”, or double-click on the file and click on “Extract all” to initiate the extraction process.
4. Now that the file is unzipped, you should have a folder with the following files and folders:



Name	Type	Pack...	Has ...	S
Application	File Folder	0 KB		0
README.txt	Text Document	2 KB	No	6
SIS_Toolkit.jar	Executable J...	6 KB	No	7

5. Double-click on the file named SIS\_Toolkit.jar. This will launch the SIS application server, start the service, and will launch your browser, bringing you to the login page of SIS in an offline mode. These tasks may take up to a minute to complete, so please be patient.

When offline SIS starts, the only indication that you are not using it over the internet are:

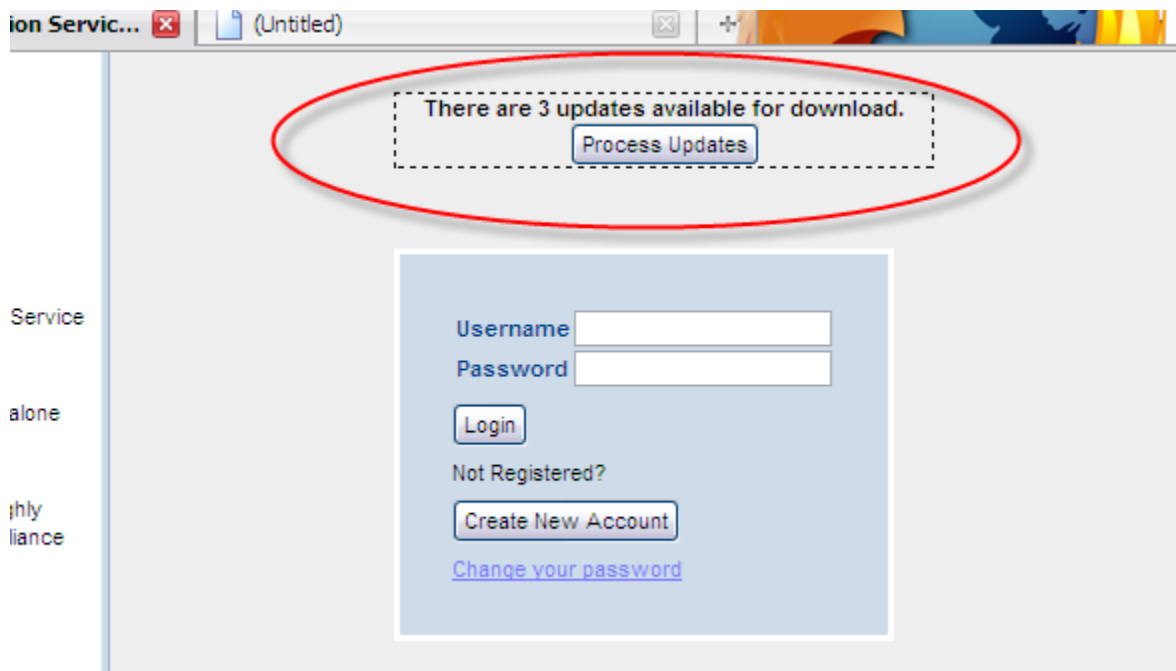
The URL in your browser will display a local address, as in <http://127.0.0.1:10000/SIS/index.html>

- and -

You will see a small icon in your computer's task bar indicating that offline SIS is running.



6. When the login page appears for the offline SIS, please note a little box at the top of the screen regarding software updates. If the box contains the text “No Updates Available”, then you have the most recent offline SIS software. If the box contains text reading “There are X updates available for download” with a button to process updates, this indicates that there are software updates available and you should press the update button in order to receive the updates. When the updates are completed, you will need to close the browser window and restart SIS. Below is a screenshot of the notification when the offline SIS is out-of-date.




7. Now, assuming offline SIS is running and you've either processed updates or are using the most recent version, and you are at the login screen, please do not log in with your normal *online* SIS password. In offline mode, SIS is an empty shell with no user accounts. You will need to create a user

account by clicking on the “Create New Account” button on the login page. Follow the prompts to create a new account; the account does not need to be identical to your online account, but should nevertheless identify you and be easy to remember.

8. Once you’ve created the user account, login to the offline SIS. Upon logging in, you should see the normal SIS dashboard or homepage, but you won’t see any working sets or recent assessments. If you’ve made it this far, offline SIS is successfully able to run on your computer and the server is started.

### Important notes

- If you close your browser while using SIS offline, you can restart it again by simply right-clicking on the little SIS icon in your task bar  and selecting “Open SIS Toolkit”. This will launch your browser and take you to the login page.
- If you turn off or restart your computer, you’ll need to go to the sisOffline folder and double-click on SIS\_Toolkit.jar, which will restart the service and take you to the login page.
- If you were not able to get SIS started in offline mode or using a Mac, please read the information in the SIS\_Offline folder in the readme.txt file.

## Exporting and Importing Assessments from Online to Offline SIS

The next step, once you've got SIS up and running offline and you've created an account, is to copy a group of assessments over from the online SIS for use by the offline SIS.

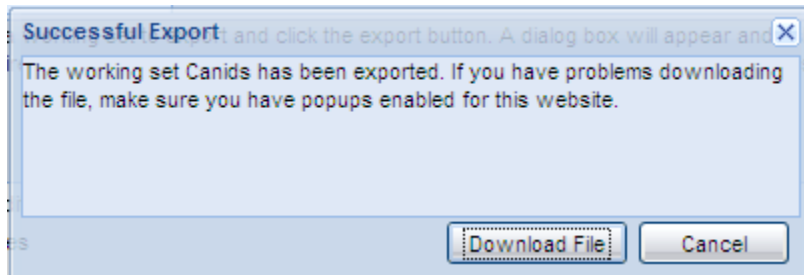
1. Log into the online SIS (<http://sis.iucnsis.org>). In order to copy assessments into the offline SIS, they must be stored in a Working Set.
2. In online SIS, locate the Working Set you'd like to use in SIS offline.
3. On the Working Set Page, click on Working Set Manager, then scroll down to find the button labeled "Export to Offline". See below.


The screenshot shows the SIS (Species Information System) interface. At the top, there's a navigation bar with a logo and a 'Navigate' button. Below this, a header section displays information for the 'Canis rufus' working set, including its name, manager (jim.ragle), creation date (2009-09-14), taxon name, status, common name (Red Wolf), level (Species), draft status (Global), assessed date (2010-03-10), last modified date (2010-01-22), and category (EX).

Below the header, there's a tabbed interface with 'Working Set Page' selected. Under this tab, there's a 'Working Set Navigation' sidebar on the left and a 'Working Set Manager' main area on the right. The sidebar lists various working sets, with 'Canids' selected. The 'Working Set Manager' area contains several buttons: 'Report Generator', 'Permission Manager', 'Delete Working Set', 'Subscribe', 'Export to Offline' (highlighted with a red rectangle), 'Import from Offline', 'Export to Access', and 'Submit for Review/Publish'. Each button has a corresponding description to its right.

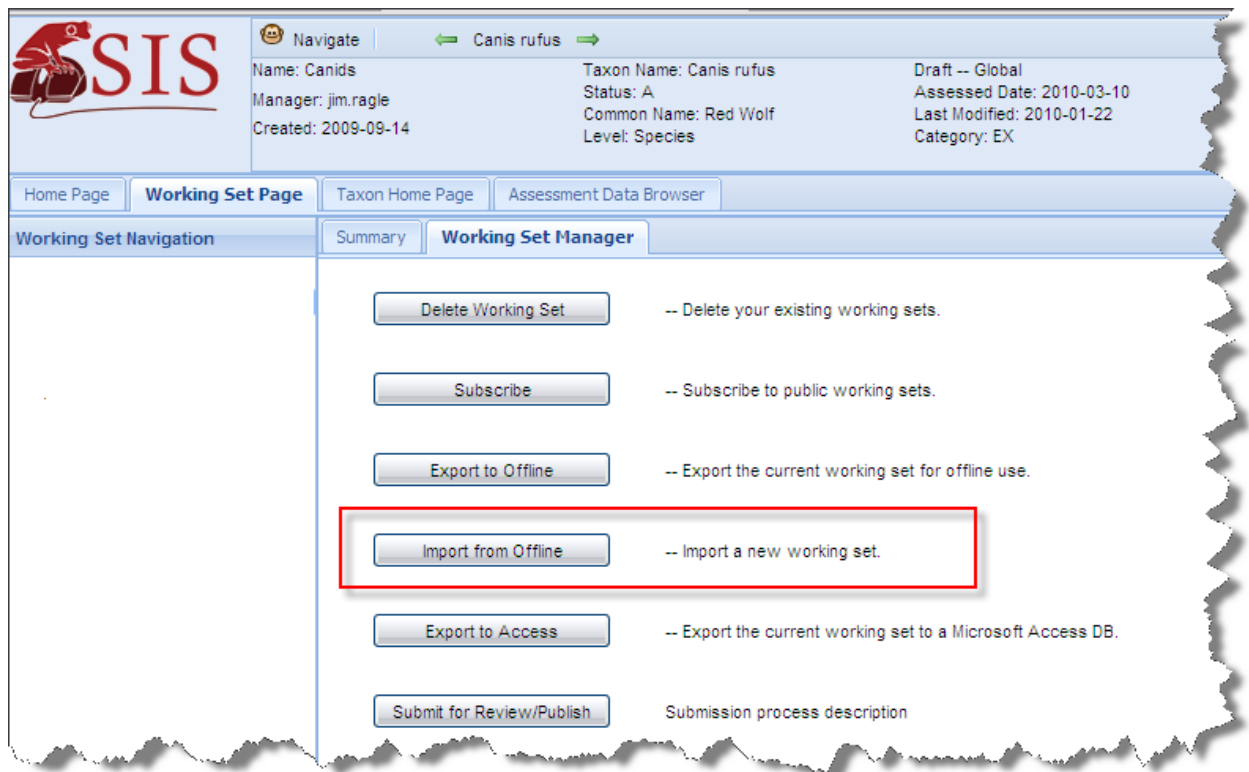
Button	Description
Report Generator	-- Generate reports.
Permission Manager	-- Manage authorized access to this working set
Delete Working Set	-- Delete your existing working sets.
Subscribe	-- Subscribe to public working sets.
Export to Offline	-- Export the current working set for offline use.
Import from Offline	-- Import a new working set.
Export to Access	-- Export the current working set to a Microsoft Access DB.
Submit for Review/Publish	Submission process description

4. Click on the Export to Offline button. Confirm by ticking the name of the Working Set once again and hit “Export” at the bottom of the screen. If you are prompted to lock the assessments, click Yes – this will avoid someone else working on those assessments while you are working on them offline. You can unlock them later when you are finished working offline.
5. Preparing the export for download may take a while, depending on the size of the working set. Once complete, you’ll receive a message alerting you that the export was successful and prompting you to download the file.



6. Click on “Download File” to begin downloading a zip file containing your working set and all assessments within it. This could be a large file. *Please note the location your browser saves downloaded files to.*
7. Once the zip file is download, **do not unzip it**. This file is going to be imported into your offline SIS as-is. Make sure you remember the location where the zip file was downloaded to, or move it somewhere obvious like your desktop.
8. Now, launch your offline SIS (either use the icon in the lower right  , or double click on SIS\_Toolkit.jar) and login using the account you created earlier.

9. Click on Working Set Page, then on Working Set Manager, then scroll down to “Import from Offline”.



It may seem illogical to click “Import from Offline”, when you are actually wanting to import **to** offline, but this is how exported working sets are imported, regardless of whether you are importing to the online or offline.

10. After clicking “Import from Offline”, browse and locate the zip file you downloaded from the online SIS. When attached, press “Import Working Set” and your working set will begin the importation process. Please be patient; depending on the size of your working set, this may take several minutes.
11. When the working set has been imported, you will be notified of its success and the new working set will be available in the offline SIS from the Working Set page. In addition, it will be displayed on your SIS dashboard.


Now, you can begin to work on your assessments in the same manner as using the online SIS.

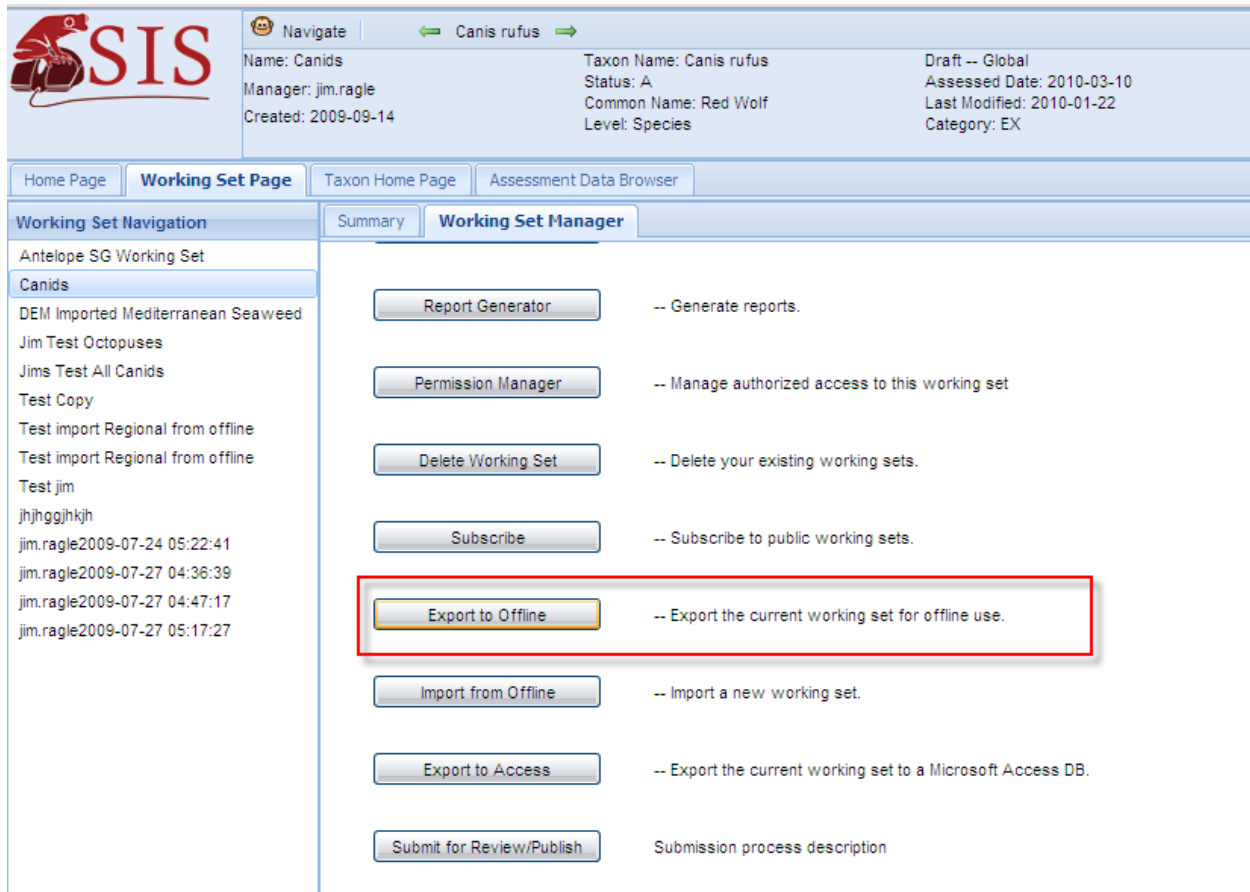
### Important notes

- Your working set and all the assessment data within it, is stored within the SIS Offline folder, which is named sisOffline and is located on your hard drive in the location you saved it to. **Please do not delete this folder, as you will delete all the assessment data you've been working on since offline.**
- If you wish to backup your work while working offline, you have two options:
  - Take the entire sisOffline folder that you are working from and save it to a USB flash drive, burn it to a CD or DVD, or otherwise copy it to a safe place. Your data is in there.
  - Use the “Export to Offline” feature (just as you did to get the assessments out of the online SIS) to create a zip file backup of your data, which you can save to a USB flash drive, etc. If you choose this option, just answer No when the system prompts you to lock your assessments. This way, you can still work on them offline but you’ll have a backup zip file. This is the preferred method as it doesn’t require as much space as the first option.

### Importing your edited assessments back into the online SIS

Once you’ve finished working on your assessments offline, it is very important to get them imported back online in a timely fashion. Follow these steps, which are almost exactly the same steps you’ve already done, in order to safely get your assessments back into SIS.

1. Log into your offline SIS (either use the icon in the lower right  , or double click on SIS\_Toolkit.jar in the sisOffline folder).
2. Locate the Working Set you'd like to place back in the online SIS.
3. On the Working Set Page, click on Working Set Manager, then scroll down to find the button labeled "Export to Offline". See below.

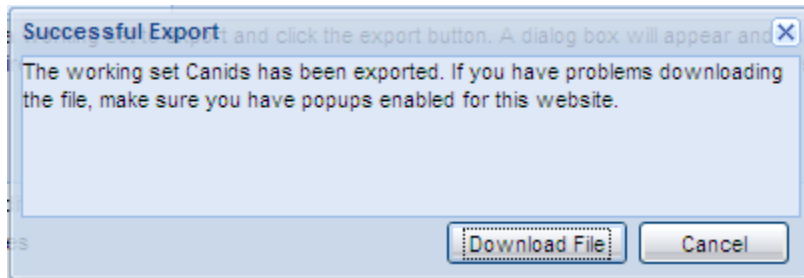


The screenshot shows the SIS Working Set Manager interface. At the top, there is a navigation bar with a logo and a 'Navigate' button. Below this, a header section displays information for the 'Canis rufus' working set, including its name, manager, creation date, taxon name, status, common name, level, draft status, assessed date, last modified date, and category. The main content area is divided into two tabs: 'Summary' and 'Working Set Manager'. The 'Working Set Manager' tab is active, showing a list of buttons for managing the working set. The 'Export to Offline' button is highlighted with a red rectangle. The list of buttons includes: Report Generator, Permission Manager, Delete Working Set, Subscribe, Export to Offline, Import from Offline, Export to Access, and Submit for Review/Publish. Each button has a corresponding description to its right.

Button	Description
Report Generator	-- Generate reports.
Permission Manager	-- Manage authorized access to this working set
Delete Working Set	-- Delete your existing working sets.
Subscribe	-- Subscribe to public working sets.
Export to Offline	-- Export the current working set for offline use.
Import from Offline	-- Import a new working set.
Export to Access	-- Export the current working set to a Microsoft Access DB.
Submit for Review/Publish	Submission process description

4. Click on the Export to Offline button. Confirm by ticking the name of the Working Set once again and hit "Export" at the bottom of the screen. If you are prompted to lock the assessments, this time click No.
5. Preparing the export for download may take a while, depending on the size of the working set. Once complete, you'll receive a message alerting you

that the export was successful and prompting you to download the file.



6. Click on "Download File" to begin downloading a zip file containing your working set and all assessments within it. This could be a large file. *Please note the location your browser saves downloaded files to.*
7. Once the zip file is download, **do not unzip it**. This file is going to be imported back into the online SIS as-is. Make sure you remember the location where the zip file was downloaded to, or move it somewhere obvious like your desktop.
8. Now, log into the online SIS (<http://sis.iucnsis.org>) and login using your normal SIS login.
9. Click on the "Working Set Page" tab, then on the "Working Set Manager" tab when it appears.
10. Scroll to near the bottom of the list of buttons and click on "Import from Offline".
11. Locate the zip file that you just created from your offline SIS work and press "Import Working Set". The importation process will begin and may take a while, depending on the size of the working set and your internet connection speed.

12. When you are notified that the working set has been imported, please check your assessments just to make sure the ones that now appear on the online SIS are the edited ones from your offline SIS work.

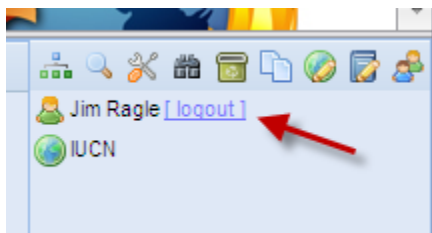
That's it. The online assessments will now be unlocked and can be edited by others in SIS, provided they have the proper editing permissions.

### Very Important final notes

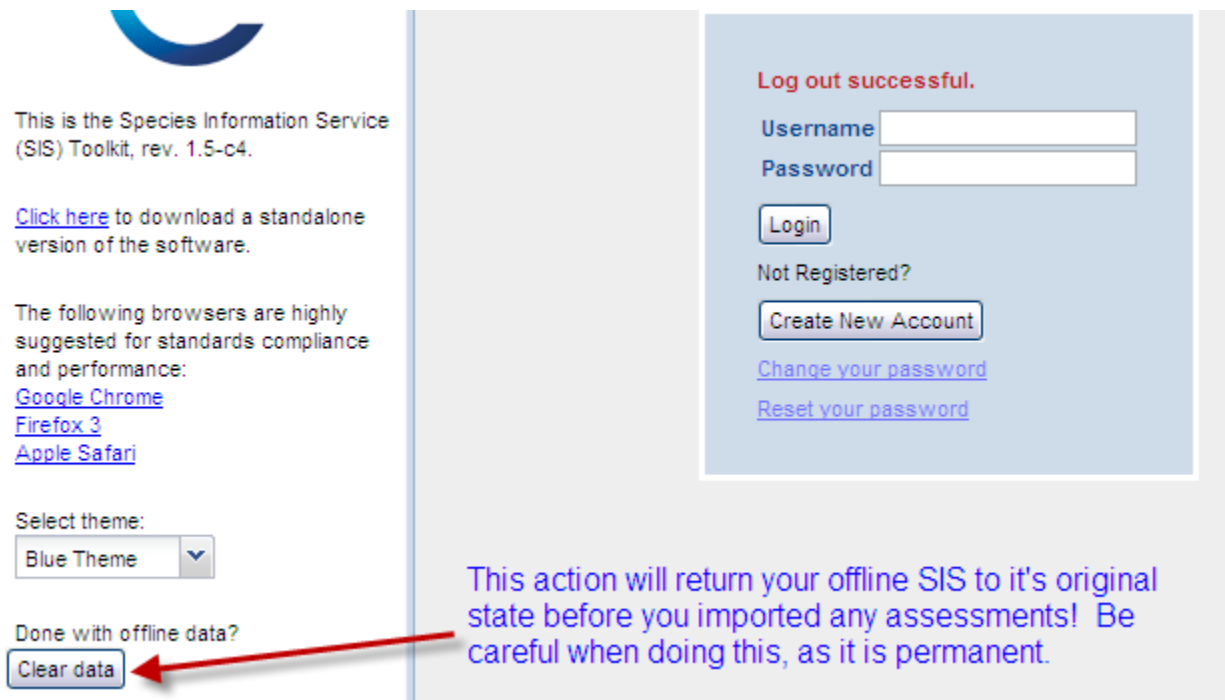
Once you've finished working offline and imported the assessments back into the online SIS, ***do not work on them anymore in your offline SIS!*** The act of placing them back into online SIS and removing the locks means the most recent version of those assessments is in the online SIS. The copy in your offline SIS should now be deleted to prevent accidental editing of them. If in the future you want to work on them again offline, you'll need to download them again from online SIS in order to get any recent changes and to lock the assessments.

The best way to manage your offline SIS after confirming that your assessments are safely back online is to do the following:

1. Make sure you have a backup copy of the zip file you used to bring the completed assessments back into online SIS – and make sure it is not stored in the sisOffline folder.
2. Return to the offline SIS login page. If logged in, simply click logout next to your name in the upper right corner of SIS.



3. Click on the “Clear Data” button in the lower left. ***This will completely clear your offline SIS of all the data you have ever imported.*** Essentially, this is used to return your offline SIS to the exact state it was when you installed it, with the exception that it saves your user account.



Remember, once you’ve brought the data back into the online SIS, there is no reason to keep it in the offline SIS.

4. Once you’ve cleared all data, you have effectively started over with a fresh copy of the offline SIS, completely empty.

### For more information or troubleshooting

If you have problems with any of the above steps, please visit <http://support.iucnsis.org> and log in with your online SIS credentials. You may browse current and solved issues in SIS, browse the user forums, and also submit your own requests for support.