

Using Offline

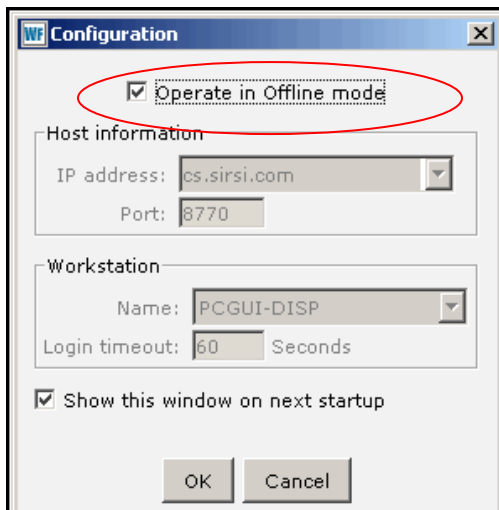
The following conditions apply to Offline:

- Transactions performed in Offline must have both an item ID and a user ID.
- WorkFlows cannot search or display information from the Symphony database about items or users while using Offline, since the workstation is temporarily disconnected from the host computer where all information is stored.
- Data recorded by Offline will be copied from the hard drive to the server automatically on the next connection to the server. The system administrator will run the Load Offline Transactions report, which will then try to perform each recorded transaction as if a staff member was at a regular workstation. Errors result when an activity recorded at an Offline workstation would have been blocked or would otherwise fail when done in a real Symphony database.
- All computers used to check items out in Offline Mode must be logged into Symphony when the connection is restored in order to capture the transactions.

To use Offline



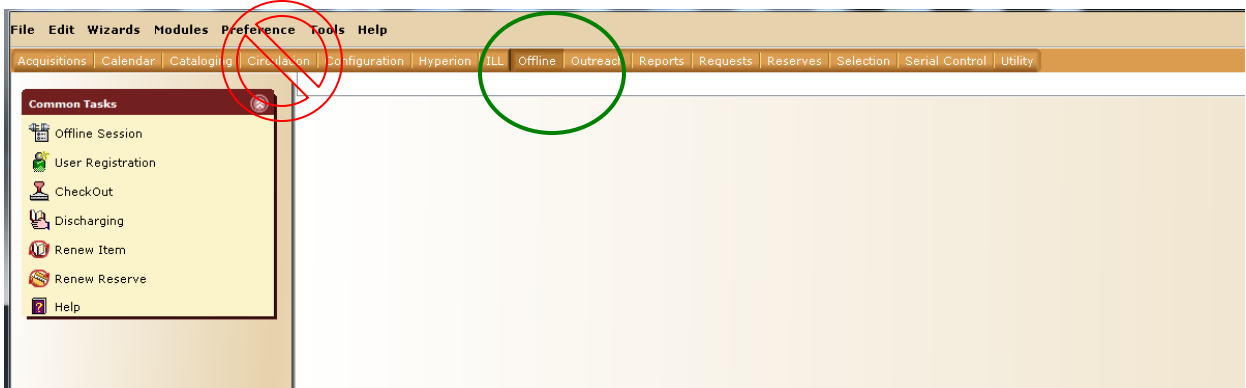
1. Double-click the **WorkFlows** shortcut on your desktop. The Configuration dialog box appears:



2. Click the **Operate in Offline mode** check box.
3. Click **OK**. This opens the WorkFlows client on your machine.
4. Click **Offline** in the module toolbar. The Offline toolbar appears.

Offline Session Wizard

1. Choose the **Offline** tab from the list. DO NOT choose the Circulation tab:



2. On the Offline toolbar, click the **Offline Sessions Settings** wizard . The following window appears:

A screenshot of a dialog box titled 'Set Session Settings'. At the top, there is a checked checkbox labeled 'Review Settings Each Session'. Below this is a 'Defaults' tab. The dialog contains several input fields: 'User access:' with a dropdown menu, 'Library:' with a dropdown menu, 'Current date:' with a date field showing '06/06/2006', 'Current time:' with a time field showing '9:21', 'Default due date:' with a date field, and 'Log directory:' with a text field showing 'C:\Documents and Settings'. Below these fields, it says 'User status generated on: Tue Jun 6 00:25:36 2006' and a checked checkbox 'Use user delinquent list file'. At the bottom are 'OK' and 'Cancel' buttons. Two green arrows point to the 'User access' and 'Library' dropdown menus. A red 'X' is drawn over the 'Default due date' field.

2. In the **User access** box, drop down the list and select the user CIRC. This is a required entry.

3. In the **Library** list, select the name of your library. This is a required entry.

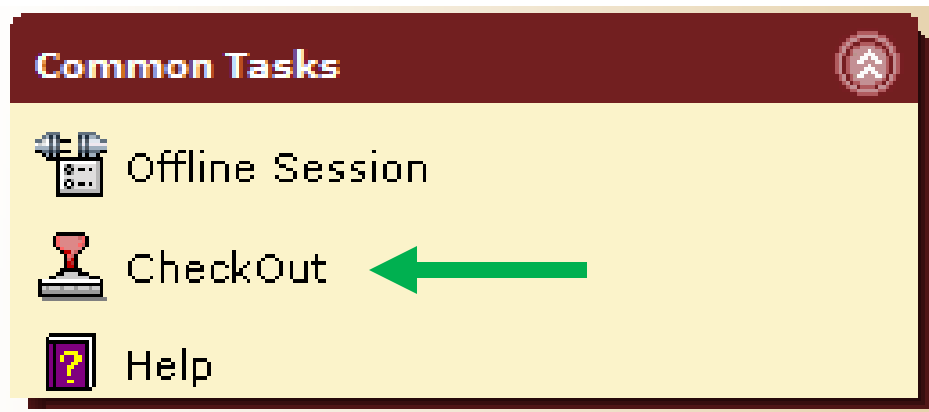
4. In the **Current date** and **Current time** boxes, accept the default values.

5. Leave the **Default due date** field blank and WorkFlows will calculate the due date when you load offline transactions to the server.
6. The **Log directory** box displays the path destination where the WorkFlows client writes the transaction log for all activities performed with the Offline toolbar. **DO NOT CHANGE THIS.**
7. Click on the check box to unselect the **Use user delinquent list file** check box.
8. Click **OK** or press ENTER to accept the settings.

Offline CheckOut Wizard

THIS IS THE ONLY FUNCTION YOU WILL EVER USE IN OFFLINE MODE!

- **Set returned items aside to be Checked In after Offline Transactions are uploaded.**

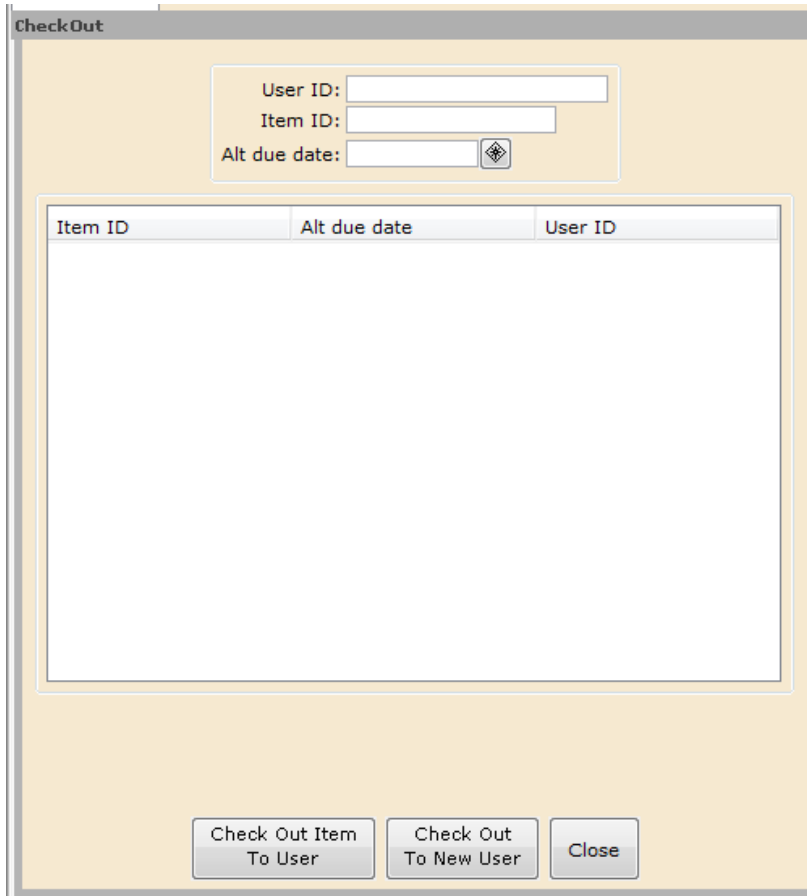


Notes:

- If an item already checked-out to a patron is charged by that patron again, WorkFlows renews the item for that patron when you upload the transactions.
- If an item is already checked-out to a patron, then checked out by another patron, WorkFlows discharges the item from the original patron and checks it out to the new patron when you upload the transactions.

To check-out an item to a library user

1. On the Offline toolbar, click the **CheckOut** wizard . The following window appears:



The screenshot shows a window titled "CheckOut" with a light beige background. At the top, there are three input fields: "User ID:", "Item ID:", and "Alt due date:". The "Alt due date:" field has a small icon to its right. Below these fields is a large empty table with three columns: "Item ID", "Alt due date", and "User ID". At the bottom of the window, there are three buttons: "Check Out Item To User", "Check Out To New User", and "Close".

2. Scan the barcode from the user's card, or type the user ID and press ENTER.

3. DO NOT use **ALT due date** as the system will apply the correct due date when the items are uploaded into WorkFlows.

4. Scan the barcode on the item, or type the item ID and press **ENTER**.

5. Continue entering barcodes until all items are checked out.

6. When you are finished, click **Check Out To New User** to end the transaction and print a receipt.