

Symphony 3.5

Offline Procedures

A set of procedures for using Offline Mode, including Starting Workflows, the Offline Session Wizard, Checkout, Check-in, help and when the connection is restored.

OFFLINE MODE SECTION TABLE OF CONTENTS

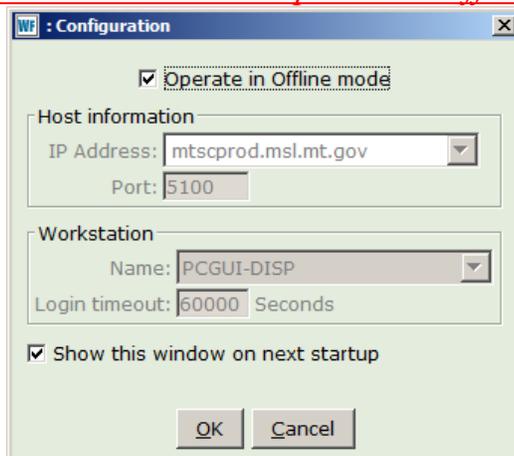
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STARTING WORKFLOWS

I. Double-click on the Java Workflows icon (Workflows 3.5.0.0J)

II. Configuration box

- A. Make sure the “Show this window on next startup” box ***is checked***
B. ***MOST IMPORTANT: CHECK the “Operate in Offline Mode” check-box.***



I. Click “OK”

II. **IMPORTANT:** When Workflows opens, select the **OFFLINE** toolbar

III. **IMPORTANT:** Check your Offline Session Settings (as detailed in next section)

OFFLINE SESSION WIZARD

I. Check that these fields are filled out correctly

- A. User Access = Your Workflows “circulation” access login. Be careful because some logins are quite similar to other libraries with similar names. Also, note that these are derived from the User Access profiles and may be different from your normal Workflows login. Example: Workflows login is LIBRHSCIRC but Access profile is LIBR1CIRC. If you select the wrong user access, your offline transactions will be loaded for the incorrect library.
If you are unsure of your User Access name, [contact MSC Support](#) before using Offline.

- B. Library = Your library policy name. Same cautions as with User Access above. Make double sure in selecting your library. **If you are unsure of your library policy name, [contact MSC Support](#) before using Offline.**
- C. Current date & Current time should be auto-populated with Today's date and the current time.
- D. Default due date = Use the Calendar Gadget to select the due date for the most frequent loan period used by your library. The default due date can be modified if necessary, while checking out items.
- E. Use User delinquent list file: Check the date the file was generated. It should be today's date with a time of around 2:30am. If the file is current, check the box. If the file is more than 5 days old, uncheck the box.
- G. Log Directory: Do not make any changes.

CHECKOUT WIZARD

I. If the Session Settings box comes up

- A. **Ensure that Offline Session settings (above) are filled out correctly**

II. Scan or type in user's library card number.

- A. Use offline mode to check out to patrons/students/staff only, not system users like "DISCARD" or "DISPLAY" or "MISSING".

III. If user is delinquent:

- A. A pop-up window will appear
- B. **Click "OK"**

IV. If user is blocked

- A. A pop-up window will appear
- B. **Click "OK"**
- C. No checkouts will be allowed

NOTE: Sections III and IV above depend on the timeliness of the User Delinquent File and if use of that file is checked in session settings. If the User Delinquent File is not used, the system cannot check user status.

V. If checkouts are allowed

- 1. If the default due date is incorrect, change it using "Alt due date" gadget.

2. Scan or type in item ID
3. If your library uses a receipt printer, place receipt in item

VI. *If checking out to another user*

- A. Click on “Check Out to New User”
- B. Return to step II

VII. Click “Cancel” or “X”

DISCHARGE/CHECKIN WIZARD

- I. *If the Session Settings box comes up*
 - A. Check that Session Settings these fields are filled out correctly
- II. **Scan or type item ID**
- III. *If you are checking in bookdrop items*
 - A. Set the Date of Discharge using the calendar gadget
- IV. **Item ID and date of discharge will appear in window.**
- V. **You may want to wait to re-shelve your items until Symphony comes back online in case you get your error report from MSC Support.**

RENEW SINGLE ITEM AND RENEW RESERVE – **DISABLED**

- I. *System cannot determine if user or item is eligible for renew. MSC members decided to not implement this feature in Offline.*

REGISTERING NEW USERS

- I. *The Register New User wizard is enabled however we discourage its use. The system has no way to check for duplicate or lost cards when offline. Use this wizard at your own risk. We recommend writing down the new user's information and then enter it into the system after it comes back online.*
- II. *Prior to using this wizard, right click on "New User Registration" and select "Properties". Select the user library, user profile and language. The department field is not required.*

HELP WIZARD

- I. Help might give you some of the information you need to use offline mode. It has its quirks, though.

Remember, in Offline mode there is no connection to the MSC servers in Helena therefore, Workflows has no way of searching and displaying records.

WHEN THE CONNECTION TO WORKFLOWS IS RESTORED

- I. **Click on the exit button to exit your current Workflows session.**
- II. **Click “yes” on the “halt your workstation” question.**
- III. **Double-click the Java Workflows icon (Workflows 3.5.0.0J) to restart Workflows.**
- IV. Configuration box
 - A. ***MOST IMPORTANT:*** *If the “Operate in Offline Mode” box is checked*
 1. **Uncheck it.**
 - B. *Make sure the “Show this window on next startup” box is checked*
- V. **Log in normally.**
- VI. **Switch back to the task toolbars you would normally use (that is; **make sure you are no longer using the Offline toolbar**) and resume normal workflow.**
- VII. **Call or email MSC Support to let us know you were offline. The system is set to automatically load offline transactions every evening at 7:25pm.** Unless you notify us that you were offline, your transactions will not get loaded until then.
 - A. When your Workstation is back online and after logging into Workflows, the system will automatically download your offline transaction file to the production server in Helena. This process will not happen until Workflows has re-established a connection with the server. Make sure you start Workflows in “online” mode for every workstation that was used during the offline session.

B. MSC staff will load the offline transactions (offline transactions are also auto-loaded daily at 7:25pm) and send any errors that were reported (such as: User not found, Item not found or Item already checked in...etc)

VIII. Clean up new user registrations (if used)

A. It is possible that some of the new users you've registered will not show up in a search. You should still be able to find them by cancelling out of the search helper and typing their barcodes into the wizard directly.

B. Check for duplicate records and add applicable data as necessary.