

# Symphony 3.2

## Offline Procedures

*A set of procedures for using Offline Mode, including Starting Workflows, the Offline Session Wizard, Checkout, Checkin, Renew Single Item, Help and When the Connection is Restored.*

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### OFFLINE MODE SECTION TABLE OF CONTENTS

Starting Workflows.....	page 2
Offline Session Wizard.....	page 3
Checkout Wizard .....	page 4
Discharge/Checkin Wizard .....	page 5
Renew Item Wizard .....	page 6
Help Wizard .....	page 6
When the Connection to Unicorn is Restored .....	page 7

## STARTING WORKFLOWS

- I. Double-click on the Java Workflows icon (Workflows GL3.2J)**
- II. Configuration box
  - A. *If the “Show this window on next startup” box is unchecked*
    - 1. Check it**
  - B. *If the “Operate in Offline Mode” box is unchecked*
    - 1. Check it**
- III. Click “OK”**
- IV. Switch to the Offline toolbar**
- V. Check your Offline Session Settings (as detailed on next page)**

## OFFLINE SESSION WIZARD

- I. **Check that these fields are filled out correctly**
  - A. User Access = Standalone
  - B. Library = [your library]
  - C. Current date = Today's date
  - D. Current time
    - 1. Should be the current time, of course
    - 2. Check this carefully
  - E. Default due date = leave blank
  - F. Use User delinquent list file = checked
- II. You can ignore the Log Directory

## CHECKOUT WIZARD

### *I. If the Session Settings box comes up*

#### **A. Check that these fields are filled out correctly**

1. User Access = Standalone
2. Library = [your library]
3. Current date = Today's date
4. Current time
  - a. Should be the current time, of course
  - b. Check this carefully
5. Default due date = leave blank
6. Use User delinquent list file = checked

#### **B. You can ignore the Log Directory**

### **II. Scan user's library card**

- A. Use offline mode to check out to patrons only, not areas like "DISCARD" or "STORYHOUR"

### *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

### *V. If checkouts are allowed*

- 1. Enter the correct due date under "Alt due date"**
- 2. Scan item ID**

**3. Place receipt in item**

B. For all 10 day checkouts

**1. Enter the correct due date under “Alt due date”**

**2. Scan item ID**

**3. Place receipt in item**

VI. *If checking out to another user*

**A. Click on “Check Out to New User**

**B. Return to step III**

**VII. Click “Cancel” or “X”**

DISCHARGE/CHECKIN WIZARD

I. *If the Session Settings box comes up*

**A. Check that these fields are filled out correctly**

1. User Access = Standalone

2. Library = [your library]

3. Current date = Today’s date

4. Current time

a. Should be the current time, of course

b. Check this carefully

5. Default due date = leave blank

6. Use User delinquent list file = checked

B. You can ignore the Log Directory

## **II. Scan item ID**

III. *If you are checking in bookdrop items*

**A. Set the Date of Discharge using the “shiny diamond” gadget**

IV. Item ID and date of discharge will appear in window.

V. You may want to wait to reshelve your items until Symphony comes back online and you get your error report from Automation.

## **RENEW SINGLE ITEM WIZARD**

I. *If the Session Settings box comes up*

**A. Check that these fields are filled out correctly**

1. User Access = Standalone
2. Library = [your library]
3. Current date = Today's date
4. Current time
  - a. Should be the current time, of course
  - b. Check this carefully
5. Default due date = leave blank
6. Use User delinquent list file = checked

B. You can ignore the Log Directory

**C. Renewals**

- 1. Enter the correct due date under “Alt due date”**
- 2. Scan item ID**
- 3. Place receipt in item**

**II. Click “Cancel” or “X” when finished**

## HELP WIZARD

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

### 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 GL3.2J) to go back in.**
- IV. Configuration box
  - A. *If the “Operate in Offline Mode” box is checked*
    - 1. Uncheck it.**
  - B. *If the “Show this window on next startup” box is unchecked*
    - 1. Check it.**
- V. Log in normally.**
- VI. Switch back to the Circulation toolbar.**
- VII. Call MSC or email MSC to let us know you’ve completed these steps..**
- VIII. Clean up offline registrations
  - 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.**

**C. Add any applicable birthdates.**

**IX. Start using Workflows normally.**