Offline Session Settings

Offline WorkFlows Session Settings are used for the standalone transactions you are creating with Offline WorkFlows while the Unicorn server cannot be accessed using standard WorkFlows.

ADMIN	CIRC1	CIRC2	CIRC3	Cataloging	Circulation	Configuration	ILL	LIB1	LIB2	LIB3	LIB4	Offline	Reports	Requests	Reserves	Utility

1. *Select* Offline toolbar

    Offline

2. *Select* Offline Session wizard

    Offline Session
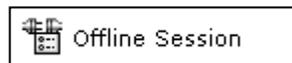
3. *Review* Settings for **each** session – do **NOT** remove check:

4. *Select* appropriate <u>staff User</u> access (to be identified with final transaction) from drop-down menu. To change the user access while in Offline Checkout, you must log out and log back in with the new user access. *This field is required.*

5. *Select* the Library Field , which is the library associated with the transactions that are ultimately loaded. *This field is required.*

6. *Enter* the date to be stamped on the transactions (when data is loaded into Workflows), or *select* the default date listed. **ALWAYS *use*** the date gadget.

NOTE: *Transactions are appended in each library's file, so you could use Offline Checkout for several days and maintain an accurate date for each transaction.*

7*. Enter* the time to be stamped on the transactions (when data is loaded into Workflows), or *select* the default time. **ALWAYS *use*** the gadget.

8. *Select* a default due date if you want all materials to be due on the same date. Otherwise, *leave the Default Due Date field blank* so that the due date is calculated at the time the offline transactions are uploaded to the server.

9. Log Directory points to where the log file will be written as data is collected on the Offline WorkFlows client. This field defaults to the **\Sirsi\Workflows\LOG** directory in Documents and Settings for PC's; defaults to /**Library /Preferences/Workflows/LOG** file for MAC's. *Note: If using an application such as Deep Freeze that restores the computer when it is rebooted, this directory must be changed to a location that is not affected by the security software or the security software must be disabled.*

10. Barcode validation is checked, to indicate that the barcode validation has been turned on in your database. Please leave this checked (unless you are sure that barcode validation has not yet been turned on). If you are not sure, ask your ITC provider.

11. If a user delinquency file had been previously downloaded into the *Sirsi\Jwf\Configure* directory, the date that the user status file was last generated is displayed. *Select* the **Use User Delinquent List File** check box if the delinquency file was recent enough.

NOTE: *If you do not use the user delinquent list file, all users are considered to have OK status. This means that users who currently have a BLOCKED or BARRED status will be able to check out items when Offline WorkFlows is used for circulation transactions. When the Unicorn server becomes available, the transactions for the BLOCKED or BARRED users are transferred to the server at the time the WorkFlows client logged in to the server.*

When the Load Offline Transactions (Loadstand) report (ITC staff) is run on the server, the BLOCKED or BARRED user status is first changed to OK. The transactions for the user are added to the Unicorn database, then the user status is returned to BLOCKED or BARRED.

This feature of the report prevents the transactions from failing and the loss of the charge information in libraries that do not use the **delinq** *file.*

12 .*Click* **OK** when you have finished entering the session information.

Note: For more detailed information or specific questions, use HELP wizard.