PC Reliance Procedures

When you are unable to connect to Horizon because of Internet problems or downtime, you can use PC Reliance to save your checkouts and upload them to Horizon when you are able to connect again. It's technically possible to also Check In, but we recommend that you only check OUT, saving checkins for later, since the PC Reliance program will not trap holds or alert you to transits.

IMPORTANT: Clear old data files when prompted if you haven't used this program for a while.

To install PC Reliance, ask for a CD from CEFLS Automation Department, and copy the file on the CD (PCRreliance205.exe) onto your desktop
Double click on it, and it will ask you for a circ point right way. Your circ point is your library's 3-letter location code.

If when you attempt your first checkout you get an error about not being able to write to the file, find out where the file location is by going to the dropdown Tools Menu and choosing Options, then going to the file tab. The file destination is there. Have IT update the security on that path so that the current user has write privileges. If IT can't do that, change the path so that the files are being saved on your desktop.

You can set up PC Reliance to use your default checkout period, and to alert you when a barcode is non-standard or a bad scan. There is a manual describing these options, but they are optional.

To use PC Reliance while Horizon is down do the following:

1. Find the icon on your desktop that looks like two arrows intertwined and is labeled "PC Reliance." The program should be available on your circulation desk computer(s).
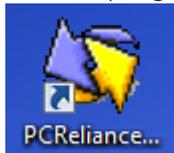

2. Double click on the icon to start PC Reliance.

3. Follow the instructions on the screen as you start the program, making sure the date and time is correct. (This is really important!)

4. During startup, the program may ask if you want to clear old transactions. If you haven't used PC Reliance for a while, **YOU MUST DO THIS**, because you won't want to upload transactions that took place a long time ago. Imagine re-checking out books that were returned 6 months ago.

Keep the old transactions only if you are continuing working on PC Reliance after closing it for the night or for a brief period.

5. On the Checkout screen, make sure the due date is correct. If it isn't, you can change it by clicking on the radio button next to "F8- Enter a due date/time."

6. Proceed to scan barcodes for borrowers and items in checkout.

7. When you either discover or are notified that Horizon is up again, you can proceed to the next section.

When Horizon is Back:

1. You can close PC Reliance at this point. You will want to upload your transactions sometime in the next hour or so, but you can use Horizon to check in and out books before doing this step if your library is busy.

2. Open Horizon and log in. Use Horizon as usual.

3. When you are ready to upload transactions from PC Reliance, do the following: At each of the worstations that used PC Reliance, go to the Circulation Folder in the navigation bar of Horizon, and find a subfolder labelled "Off-line Circulation Control Menu."

4. Double-click on the folder, **or** click once on the + sign to see its contents.

5. Double-click on "Offline Circ Upload Utility." A grey window opens.

6. Click on the word "File" in the upper left corner of the window, and choose the option "Upload Transaction File."
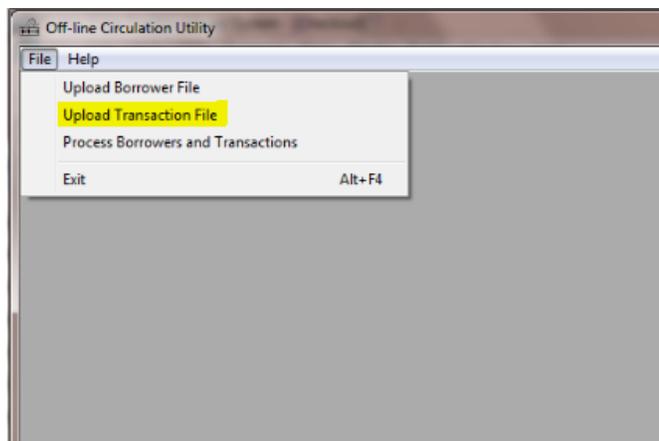
7. A window should open, and if PC Reliance has been previously used it should show a folder called "Data" and a file called "reliance.dat" or "reliance" If it does not show that, you can find it by clicking on the down arrow of the "Find in" blank. If you can't find the file this way, do a search on your computer for this reliance.dat file. **Make sure you choose the most recent version of this file if you have several to choose from.**

8. Once you have the "reliance.dat" file in the window, click on it to highlight it and click on Open.
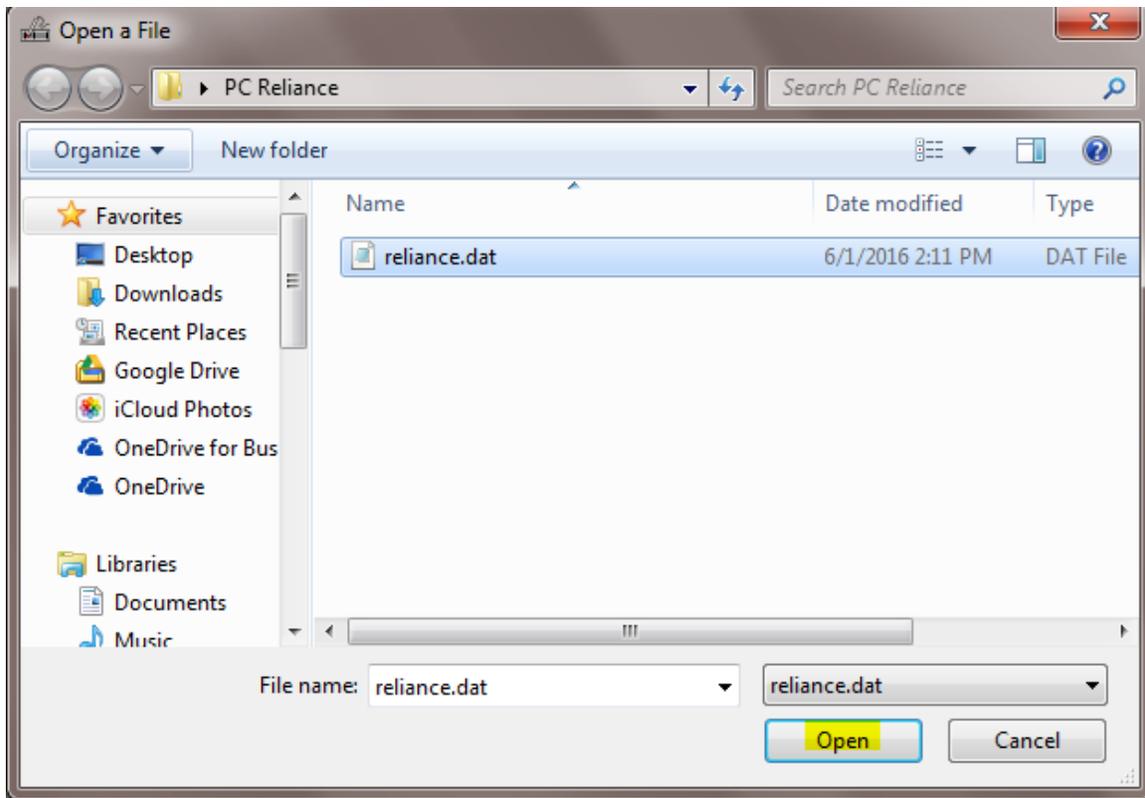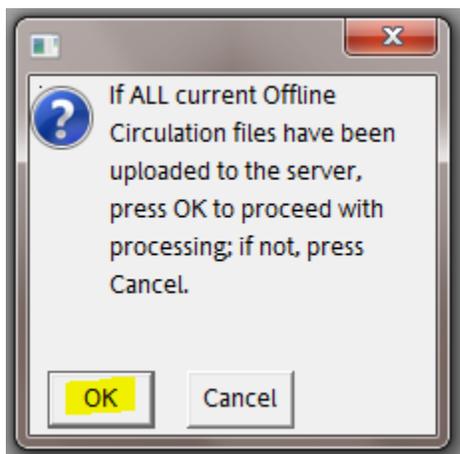

9. The program will tell you when it is finished uploading the transactions:

10. You will need to do the upload step described above on each workstation you used when Horizon was down. If you only used one workstation, or when finished this step on all workstations, proceed to the next step.

11. Do the final step from only one workstation:

12. While on the grey screen of Offline Circulation Upload Utility, Click on File again, and choose the option "Process Borrowers and Transactions."
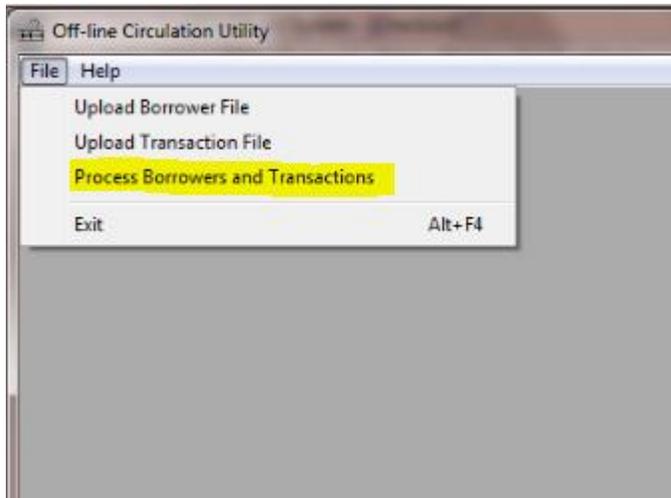
13. (Say OK to the message "if all…."

14. The program will tell you when it is finished, with a message like this:
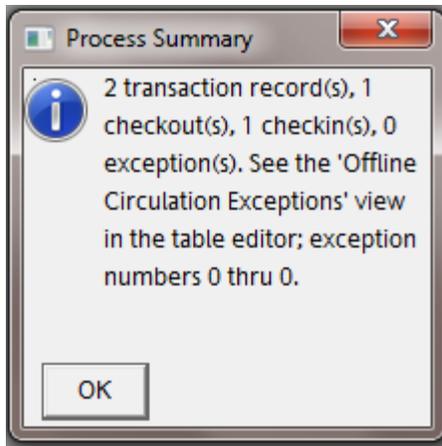
15. Zero exceptions means no problems, but if you have exceptions you may want to call the CEF for further assistance in understanding the report.

16. After you have successfully uploaded the data, say OK to the message and close the gray window. It is a good idea to go back and open PC Reliance, click on the File menu and choose "Clear Data Files." This will insure that you don't have outdated files that may cause problems later.