

How To...

Work Offline

Introduction

The Key allows users to work with selected client data whilst not using the application online. The system works by taking a copy of the selected online client and making it available for access offline. When the client has been amended, the adviser will go through a synchronisation process to ensure that the online database is updated with any changes.

When a client file has been made available for offline working, a copy remains on the online database and is locked to a read-only mode until the synchronisation has taken place. This makes sure that data cannot be updated both offline and online, which could cause some changes to be lost.

Note that once the Key is setup for offline working, it will automatically run the synchronisation process each time it is closed down. This acts as a reminder to ensure that any changes are made to the online database.

Setup

The initial setup process requires the user to be connected to the internet. From the login screen, select 'Work Offline' from the 'Database' dropdown option.

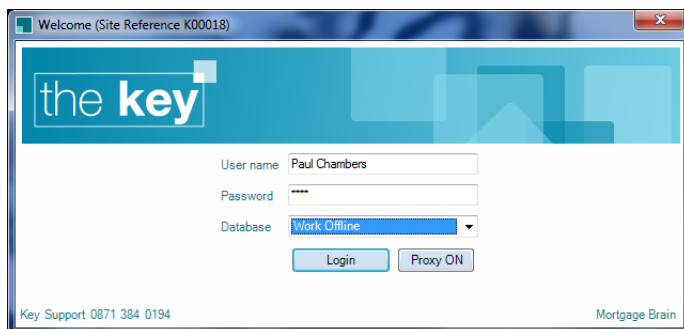


Figure 1: Selecting 'Work Offline' Database

As soon as 'Login' is selected, the Key will identify that no previous offline working has been setup, and will present the following message.

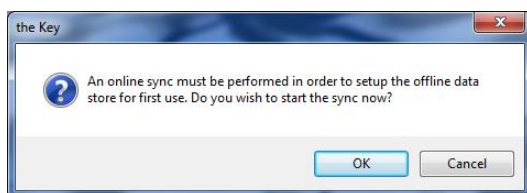


Figure 2: Initial Sync Message

Click 'OK' to start the initial synchronisation process. After a moment, the Key will present a 'Sync Clients' window.

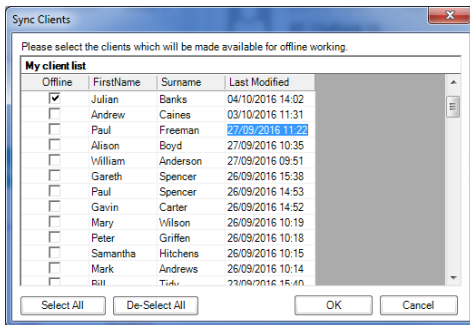


Figure 3: Sync Clients Window

Clients that are required for offline working can be selected at this point. Clients that are not selected will still appear in the Key when working offline, but the data will be in read only mode. Clients are added by placing a tick in the 'Offline' column next to their name, with the option to select or deselect all through the appropriate buttons.

Once the required clients have been identified, click OK to complete the initial sync. As the Key completes the required actions, a progress bar will be displayed.

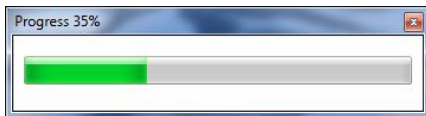


Figure 4: Progress Bar

Note that the clients available for offline working can be updated at any stage. Once the process has completed the Key will confirm that the sync has finished.

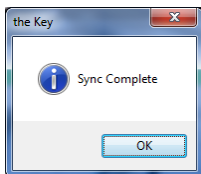


Figure 5: Sync Complete Confirmation

Clicking OK will open the offline database.

Choosing Clients to Synchronise

Once the initial sync has been run, each time the Key is closed the following message will be displayed:



Figure 6: Synchronise Prompt

If no clients need to be made available for offline use, simply click 'No'. Clicking 'Yes' will present the Sync Clients list to select which client files are to be made available for offline editing (as above).

Working with Clients Offline

This section assumes that the synchronisation process has been completed.

Log into the Key using the 'Work Offline' database.

Note that the Key will try to log onto an online database if possible. If a connection is identified, the following prompt will appear:

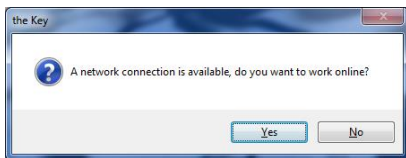


Figure 7: Network Connection Alert

In this case click 'No' if the Key is to be opened in Offline mode.

To clarify whether the offline database is in use, look at the window's 'Title Bar' which will say 'Offline', and the main menu will not offer any Reporting or Setup options.

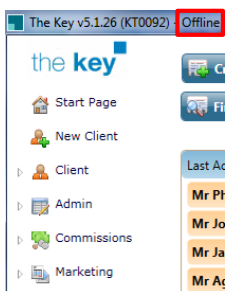


Figure 8: Offline Working

The 'Client' menu option will display all clients by default, although those that have not been synchronised will only be available in read only mode. If such a client is opened, the following message will be displayed.

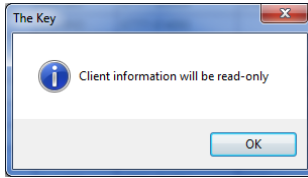


Figure 9: Read Only Confirmation

To restrict the list of clients to only those that are fully synchronised for offline working, check the 'Offline clients only' box.

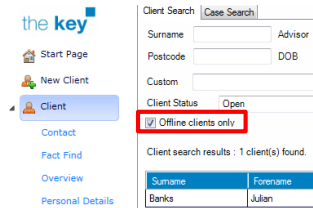


Figure 10: Offline Clients Only

Accessing an Offline Client in the Online Database

Once a client has been marked for offline work, the client data will still be available to a user logging into the online Key database for viewing purposes. The following message will be displayed if the user tries to open a client that has been marked for offline working.

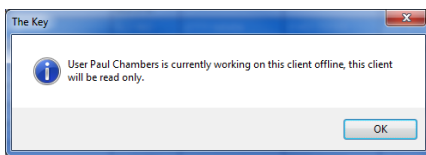


Figure 11: Client Locked Message

Uploading Offline Changes

Logging into the online Key database will automatically trigger the process to upload any client changes. The Key identifies if changes have been made, and prompts the user with a synchronisation alert.

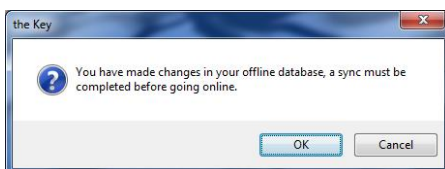


Figure 12: Sync Required Alert

Clicking OK will present the 'Sync Clients' window. To ensure that a client previously marked for offline working is transferred to the online database, remove the tick in the 'Offline' column next to their name(s).

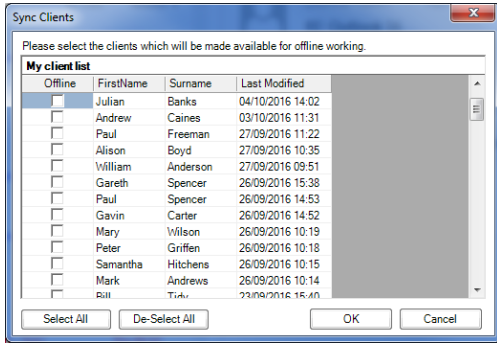


Figure 13: Checks Removed in Offline Column

Once the sync process has completed, the Key will open with the usual online database.

END