

Using Workflows Offline Mode

Revised October 2023

Available online at:

<https://support.librariesofrsa.org/project/offline-mode-workflows/>

Important things to know about Offline Mode:

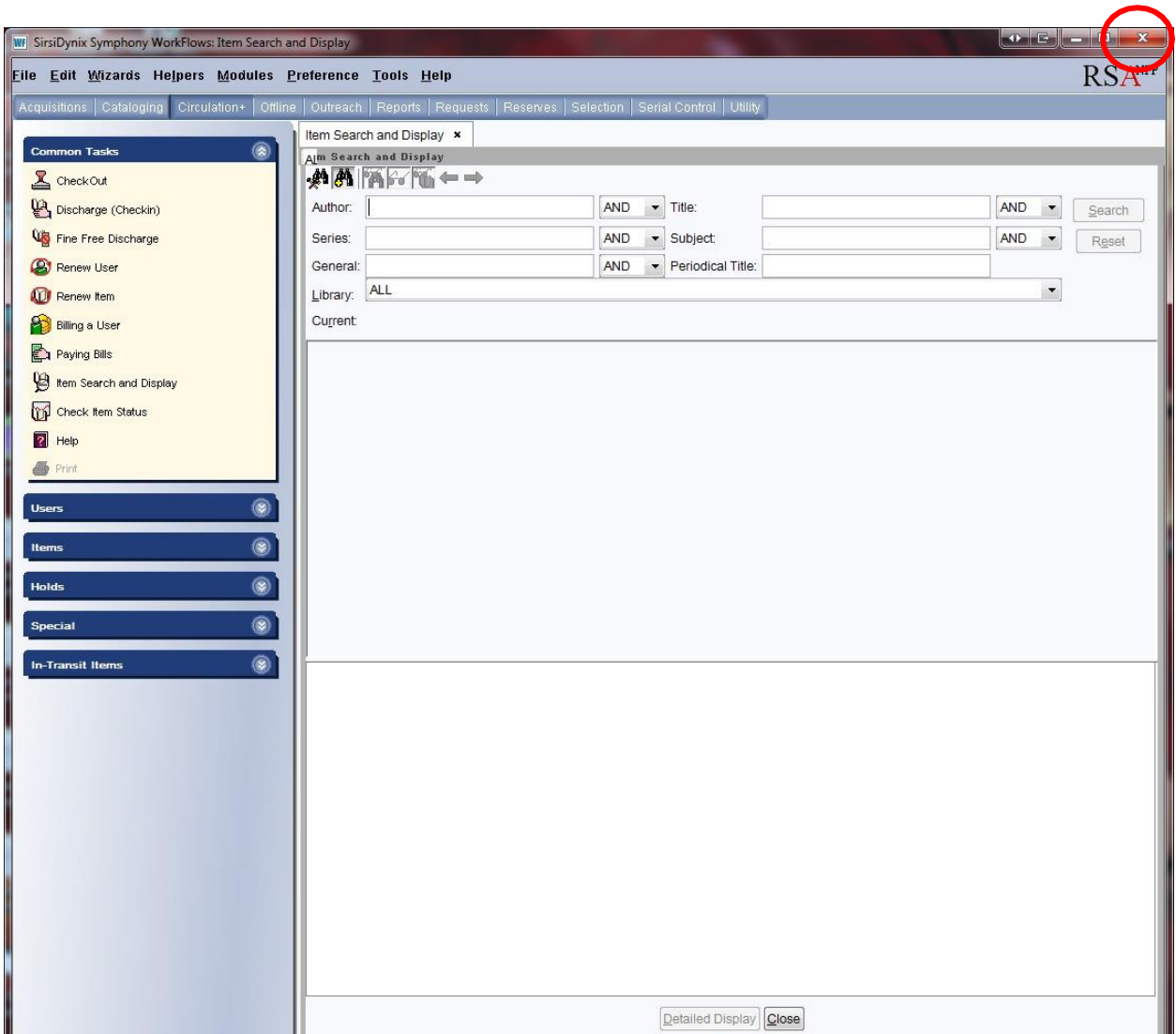
1. The only wizards staff should use in offline mode are the **Checkout and Renew Item** wizards.
2. RSA **does not recommend** libraries discharge items or register users when using the Offline Module. Both functions can cause errors leading the system not to record these transactions.
3. In offline mode, the system will not know whether patrons have overdues or fines, whether patrons are blocked due to excess fines or lost items, whether patrons have holds, or what titles patrons currently have charged out.
4. There is no way to look up patrons by name or items by title or item ID in offline mode. Patrons will need their bar-coded library cards. Patrons will need to have the physical item or a receipt with the item ID to renew an item. To check books out to patrons without library cards during this process, write down or scan into a Word or an Excel document the patron's name and the barcodes of the items the patron takes and enter the barcodes manually once you can access WorkFlows online.
5. All users are considered to have OK status. Users who are blocked or barred will be able to check out items. This keeps transactions from failing or charge information from getting lost.
6. If an item is already charged out to a patron, the item will be renewed for that patron when the transactions are uploaded to the server.
7. If an item is already charged out to a patron, then charged out to another patron, the item is discharged from the original patron and checkout to the new patron when the transactions are loaded to the server.
8. Only one Windows profile login may be used on a computer with multiple Windows user profiles while using Offline mode. This avoids losing data. In other words, log into the computer once and leave it logged in until the library closes. Offline transactions are saved in a log file based on the Windows login, not the WorkFlows login. WorkFlows automatically uploads the log file as part of the normal Workflows login process. Once you have logged into WorkFlows after WorkFlows is back online, the offline log file is emptied.
 - a. Note: Libraries that use software to 'freeze' their computers so they are exactly the same each time they start will erase the log file when they restart. If your computer does this, either leave it running and logged in until the RSA system is available again and you can log into Workflows normally or contact your system administrator to have this stopped.

9. RSA processes offline transactions 4 times a day at roughly 9:30am, 10:30am, 2:30pm, 5:00pm. The database gets updated around those times if you have come back online before then.
10. Receipt printers will work with offline transactions after setting the “Charge printing” settings in the properties of the Checkout and Renew Item wizards of the Offline Module.
11. The receipt printer must be your Windows default printer to use the receipt printing function.
12. Receipts will contain limited information since the Offline module cannot query the server to retrieve the patron’s name or the title of the item.

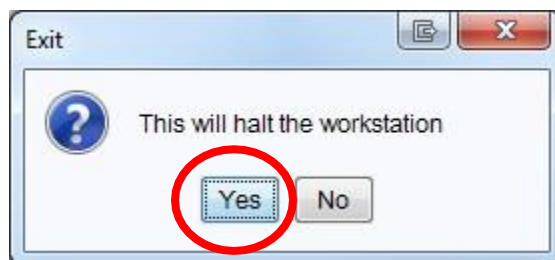
See pages 10-17 of this document for printer set up instructions.

Starting Workflows in Offline mode

If Workflows is open, close WorkFlows by clicking on the “X” in the upper right hand corner.



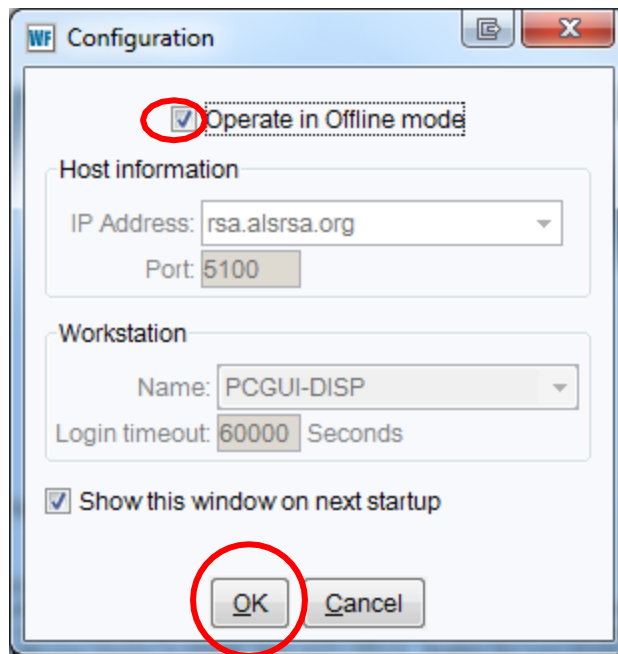
Click “Yes” on the “Exit” popup box.



Start Workflows by double clicking the Workflows icon on your desktop.



In the “Configuration” popup box, put a check mark in the box next to “Operate in Offline Mode.” Checking the “Operate in Offline Mode” box grays out the Host information and Workstation boxes.



Click “OK” and wait for Workflows to open.

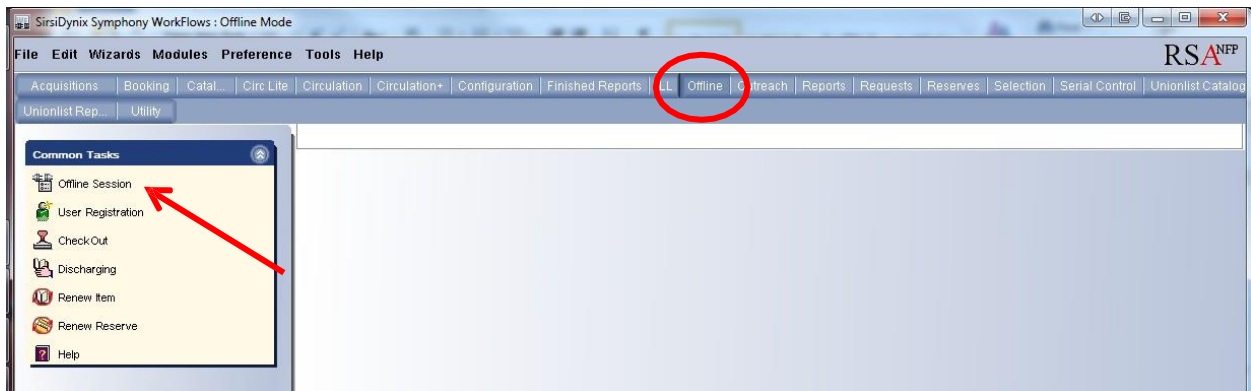
If you have not yet logged into WorkFlows, click the WorkFlows icon on your desktop and follow the above “Configuration” box instructions.

Switching to the Offline Module

Workflows will open in the same module in which it was closed. For most libraries, this will be the Circulation or Cataloging module. If you attempt to check out items in the Circulation module, you will get this message:

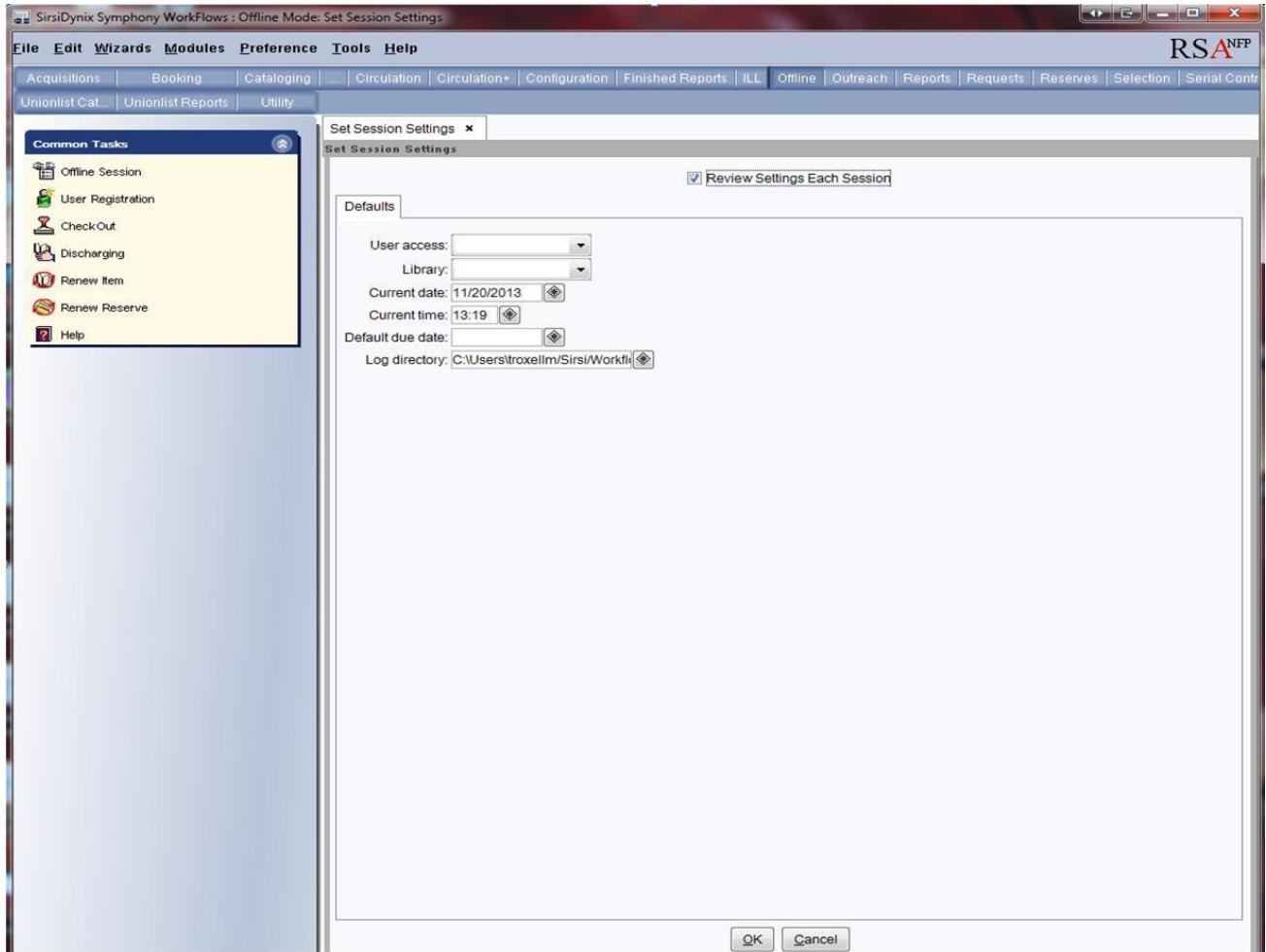


Click on the Offline module. This will bring up the Offline wizard group.



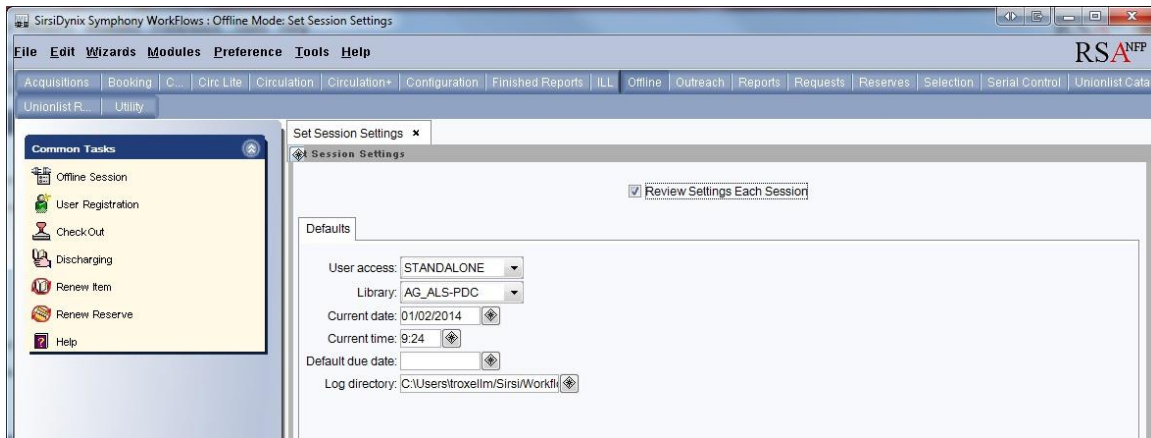
Open the “Offline Session” wizard.

The “Set Session Settings” screen will open.



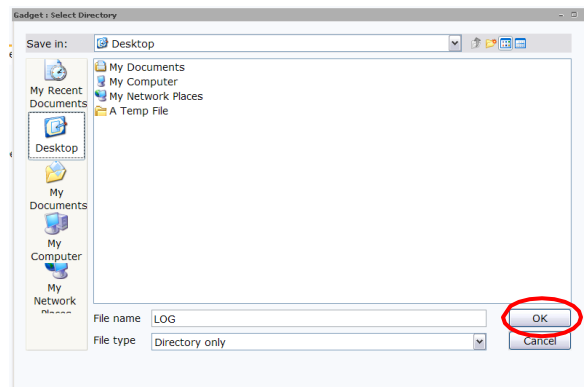
Setting up an Offline Session

The “Offline Session” wizard sets the defaults for the other wizards. If you try to use the other wizards without going to “Offline Session” wizard first, it will come up automatically.



Leave the “Review Settings Each Session” at the top of the Set Session Settings screen checked. Set the other settings on the Default tab as follows:

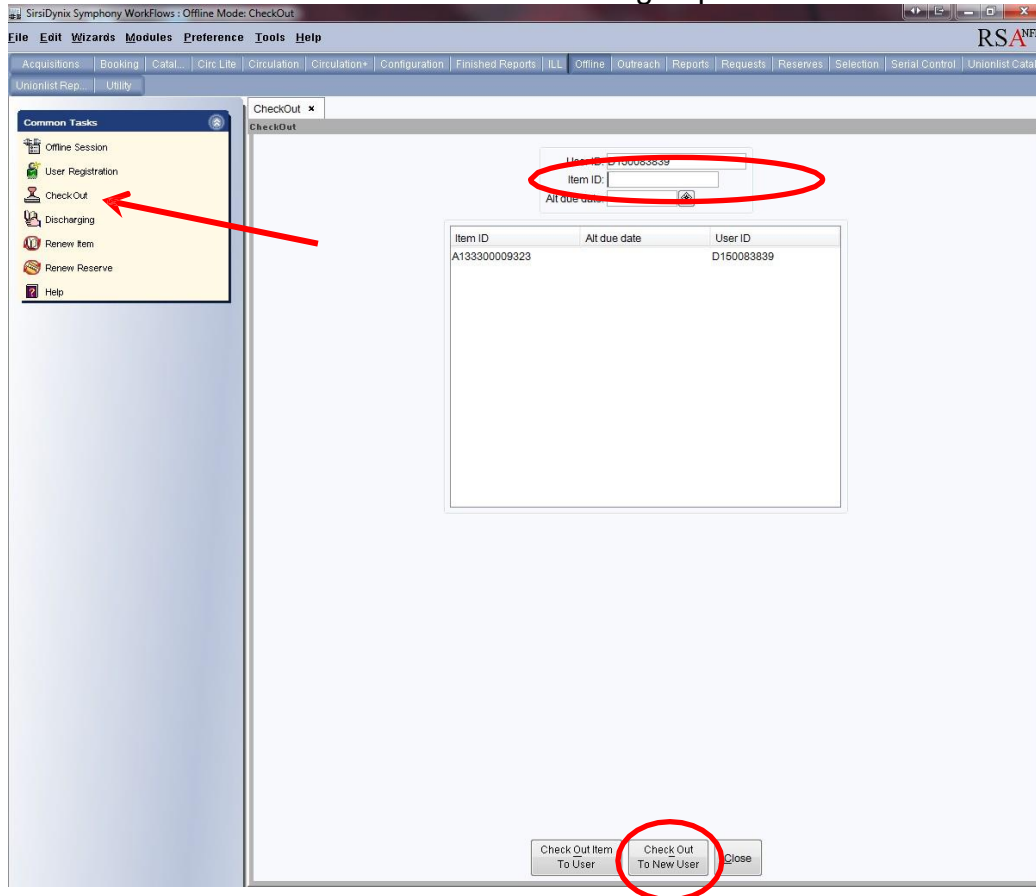
- **User Access:** Select “STANDALONE” from the drop down menu.
- **Library:** Choose your library’s WorkFlows name from the drop down menu. (Remember that you can type the first couple of digits of your library’s WorkFlows name to go directly to it in the list)
- **Current Date:** Should be correct; check it to be sure
- **Current Time:** Time is displayed in military time and is based on your computer time your started WorkFlows. Use the gadget after the current time box to view the military time in standard time.
- **Default due date:** Leave this box blank to have the due date calculated at the time the offline transactions are uploaded to the server based on your library’s circulation map. Note: “Date due” will not print on receipts if the “Default due date” is blank. In Offline Mode WorkFlows cannot query the server to access your library’s circulation rules.
- **Log directory:** This location must be writable for your Windows login user. Many libraries’ computers do not have administrator access meaning you cannot save files to most locations. If this is the case for you, click the gadget icon (little diamond button) next to the Log directory box, then click Desktop and then the OK button. This will make the offline log save to your desktop.



Click the “OK” button at the bottom of the screen.


Checkout

Open the “CheckOut” wizard in the Common Tasks group.



- Scan the patron’s library card barcode into the User ID box.
- Scan the item’s barcodes. Only the Item ID and the User ID will appear in the checkout display box. Since the server is not queried during the transaction the patron name or title will not displayed.
- When finished, click the “Check Out to New User” button on the bottom of the “CheckOut” screen.

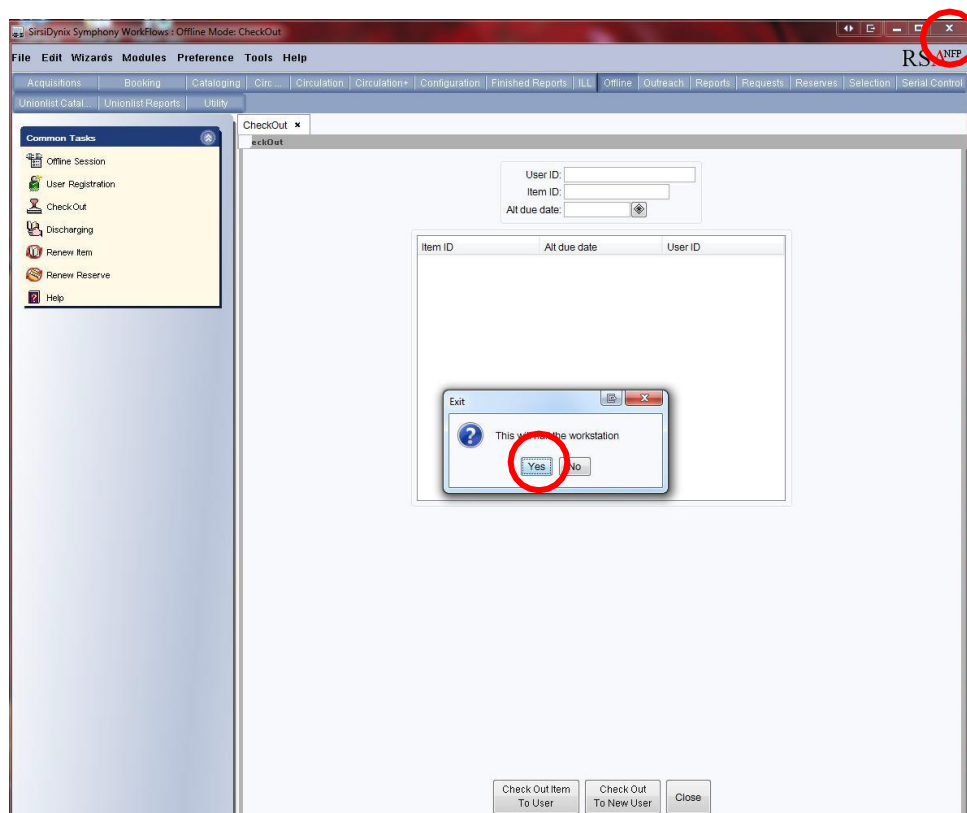
Items charged out to a Blocked or Barred patron using offline mode will be charged out to the patron’s account at the time the offline transactions are uploaded to the server. The patron’s status of Blocked or Barred will be removed. The items will be charged out to the patron and the Blocked or Barred status will be replaced on the patron’s account. This keeps transactions from failing or charge information from getting lost.

Note: Although the program lists “Alt. due date,” there is nothing alternate about it. This is the due date that will be used. It can be changed by clicking on the gadget  to the right of the date and choosing the correct date from the calendar.

If you have filled in a “Default due date”, you will need to change that date for each item type that does not use the default due date. If you change the date, it will stay changed until you change it back, even between multiple users. Closing and then re-opening the Checkout wizard will reset the date to the default you set earlier in the offline session setup window. Remember: you can leave the “Default Due Date” blank when setting properties. When the transactions are uploaded to the server, the library’s circulation map will be accessed. Items will be checked out for the correct loan period.

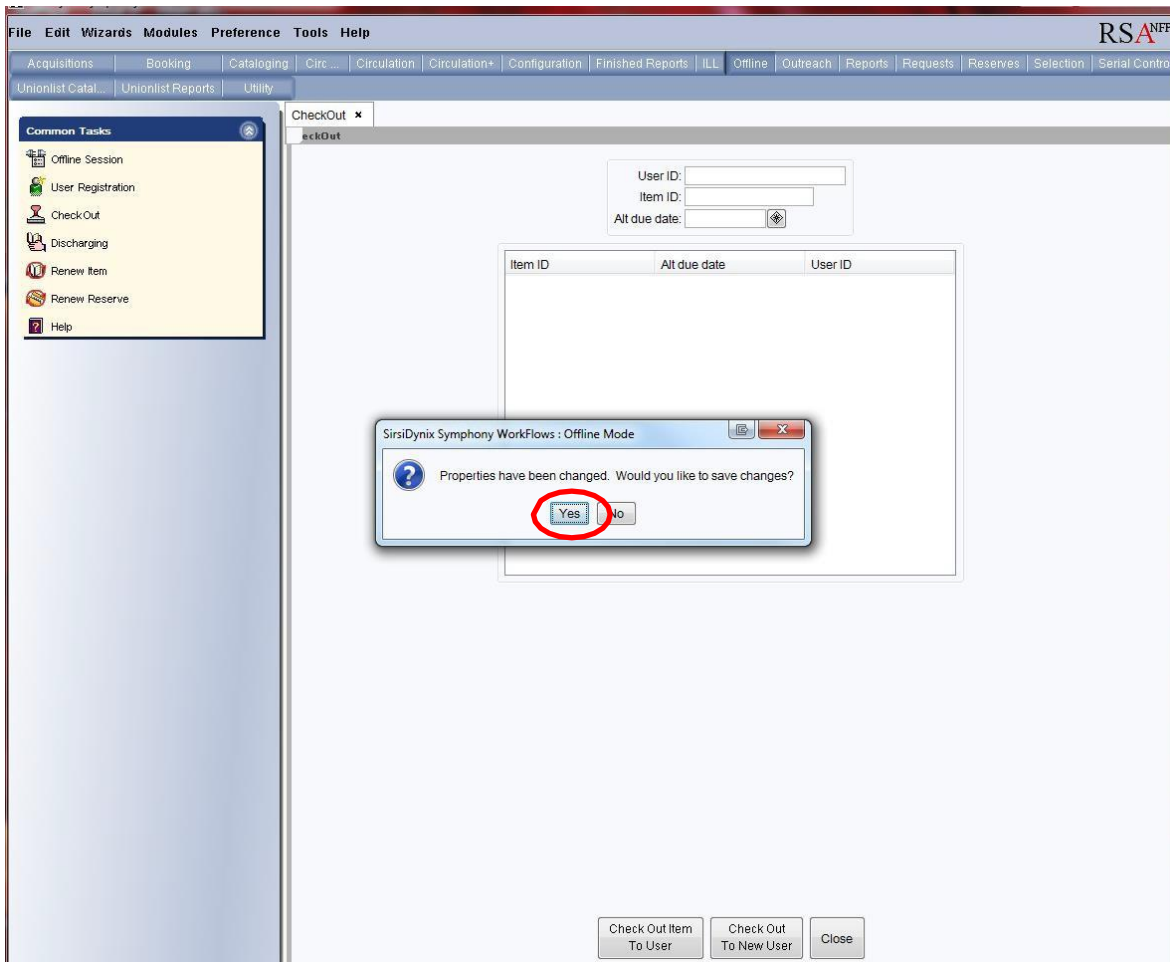
RSA does not recommend libraries discharge items or register users when using the Offline Module.

When WorkFlows is available on online or at the end of the day, use the red X at upper corner of WorkFlows to exit WorkFlows in the Offline Mode.



The “Exit” box will pop up.

Click the “Yes” button on the “Exit” box.

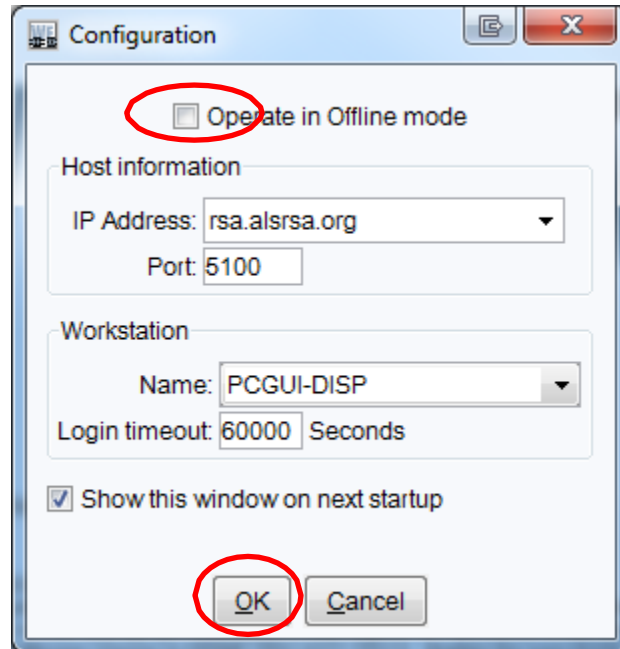


A “SirsiDynix Symphony WorkFlows: Offline Mode” box will pop up. Select “Yes” on the “SirsiDynix Symphony WorkFlows: Offline Mode” save changes popup box to save the checkout and receipt settings.

WorkFlows will close.

Then next time you open WorkFlows you must remove the check mark from the box in front of “Operate in Offline mode” on the “Configuration” pop up box on each computer that accessed WorkFlows in Offline Mode.

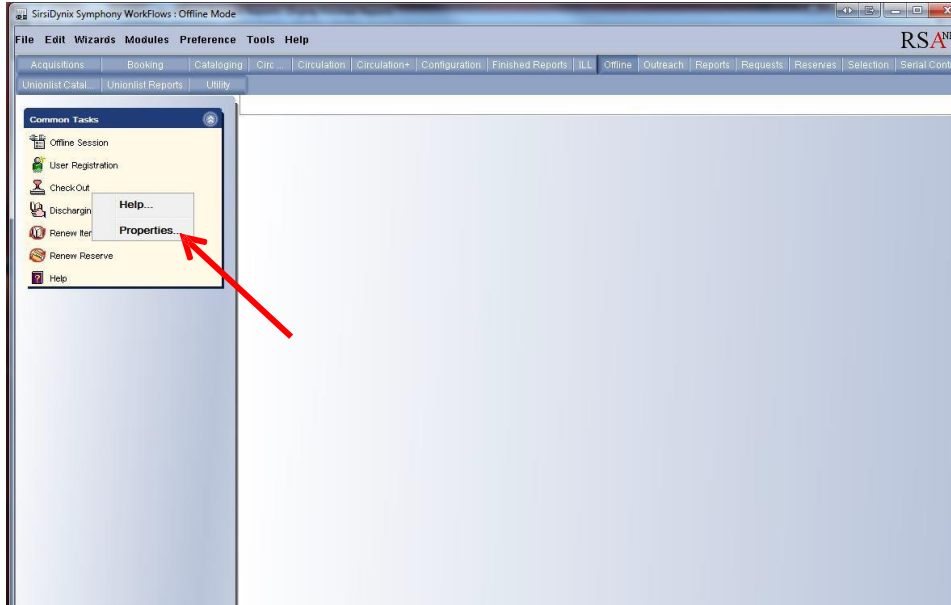
Information on the “Configuration” pop up box will no longer be grayed out.



Click the “OK” button on the bottom of the “Configuration” popup box. You are now operating WorkFlows in online mode.

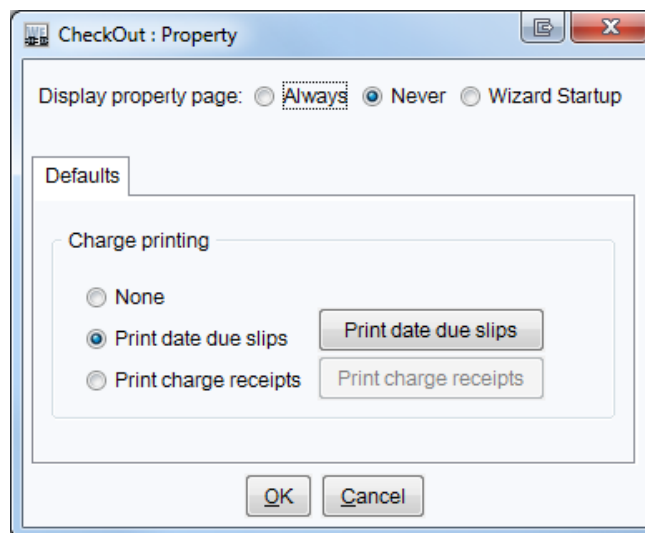
- Discharge items that were not discharged during the time you were using WorkFlows in Offline Mode.
- Manually enter any checkout, renewal, or holds that could not be entered while in the Offline Mode.
- Register new patrons that could not be registered while in Offline Mode.

Printer Set Up:



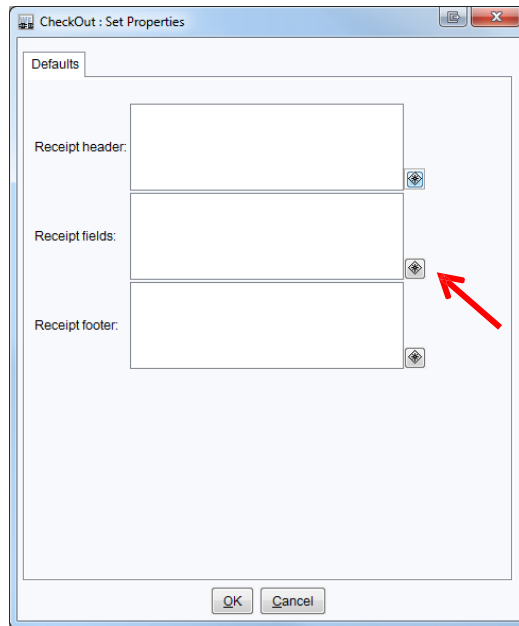
Place the cursor on the “CheckOut” wizard in the Common Tasks toolbar and right click.

Select “Properties” from the drop down menu.

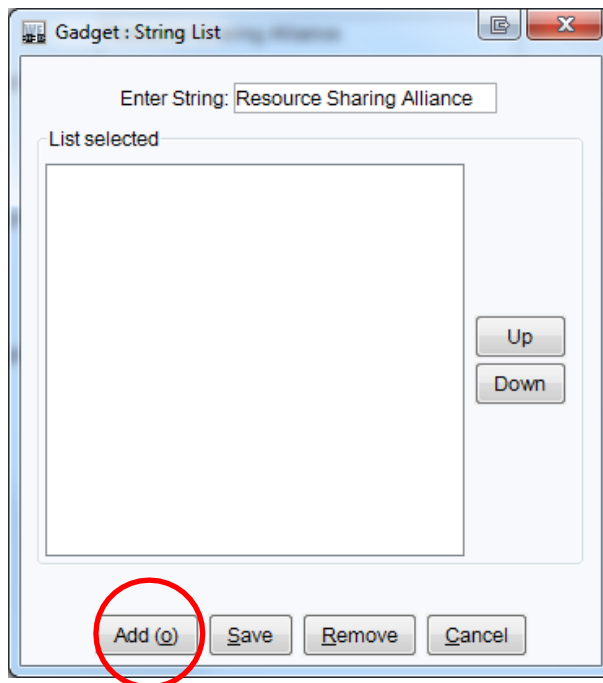


On the “CheckOut: Property” popup box:

- “Display Property” page: Select the “Never” radio button
- On the Defaults tab:
 - Select the “Print Date Due Slips” radio button.
 - Click the highlighted “Print Date due slips” bar.

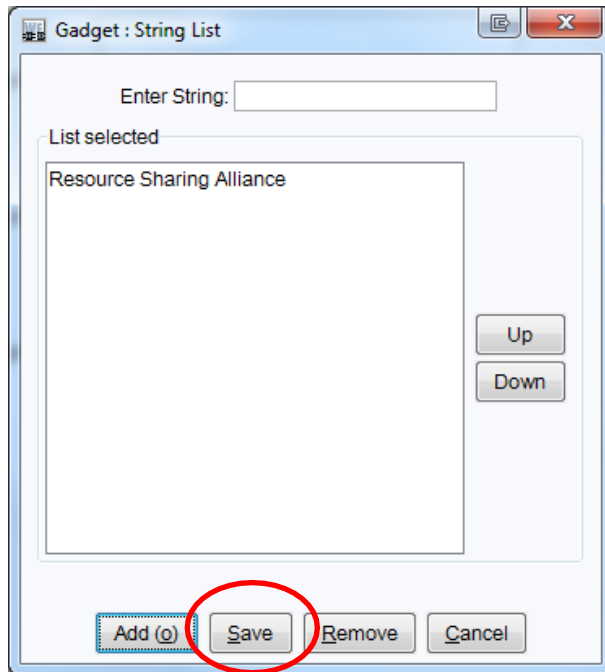


Click the gadget  to the right of the “Receipt header” box.

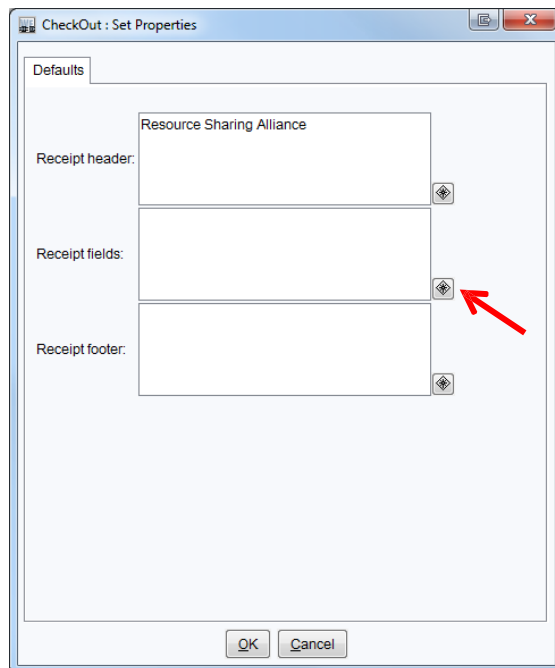



Type your library name in the box following “Enter string”. The “Enter String” box will hold only 30 characters. If you want additional information with more than 30 characters you will need to create multiple strings.

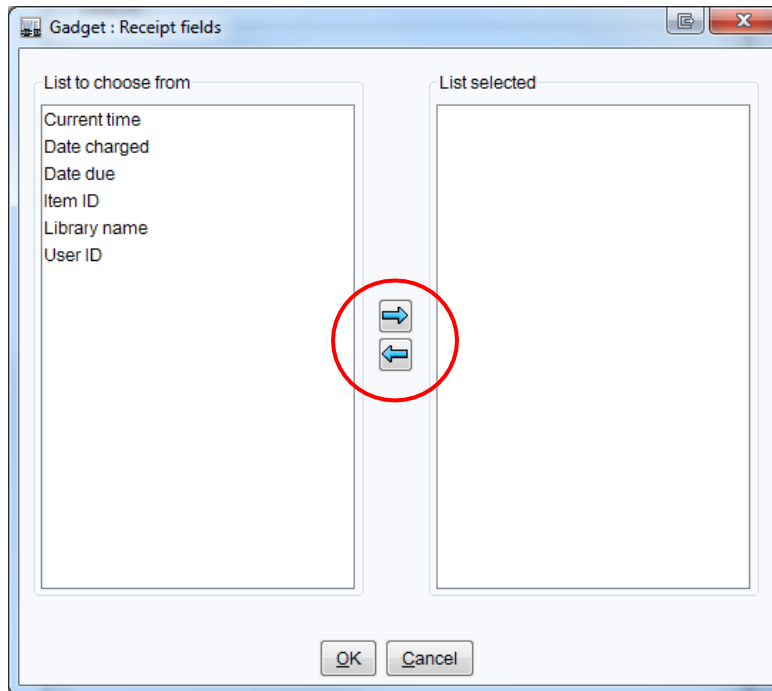
Click on the “Add” button at the bottom of the “Gadget: String List” pop up box.



The library name will be added to the "List selected" box. Additional information may be added to the "Receipt Header". Click the "Save" button.



The library name will appear in the "Receipt header" box. Click the gadget  to the right of the "Receipt fields" box.

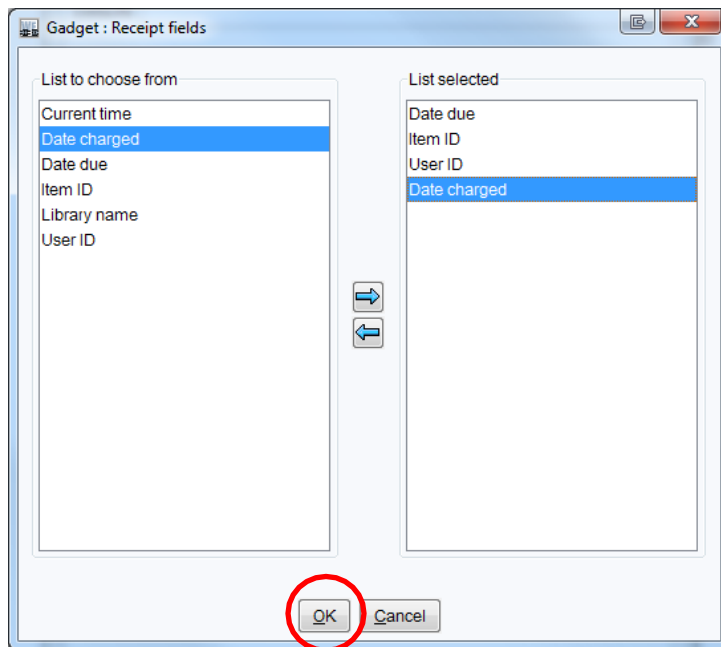


The “Gadget: Receipt fields” box will popup.

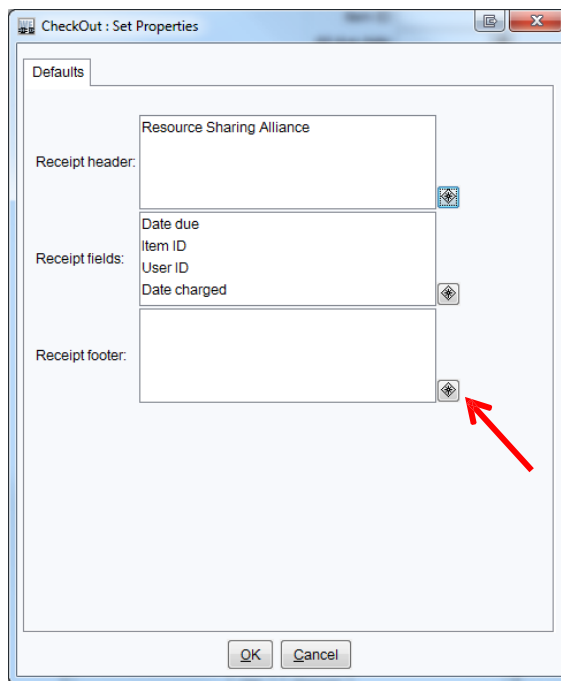
Use the arrows in the middle of the “Gadget: Receipt fields” pop up box to select the field to include on the patron’s receipt. (Library name will be your WorkFlows 10 digit name: example AG_ALS-PDC)

Due dates will not print on the receipt if “Default due date” is left blank in the session settings.


Since the Offline Module cannot access the server, only limited information will be available on the receipts.

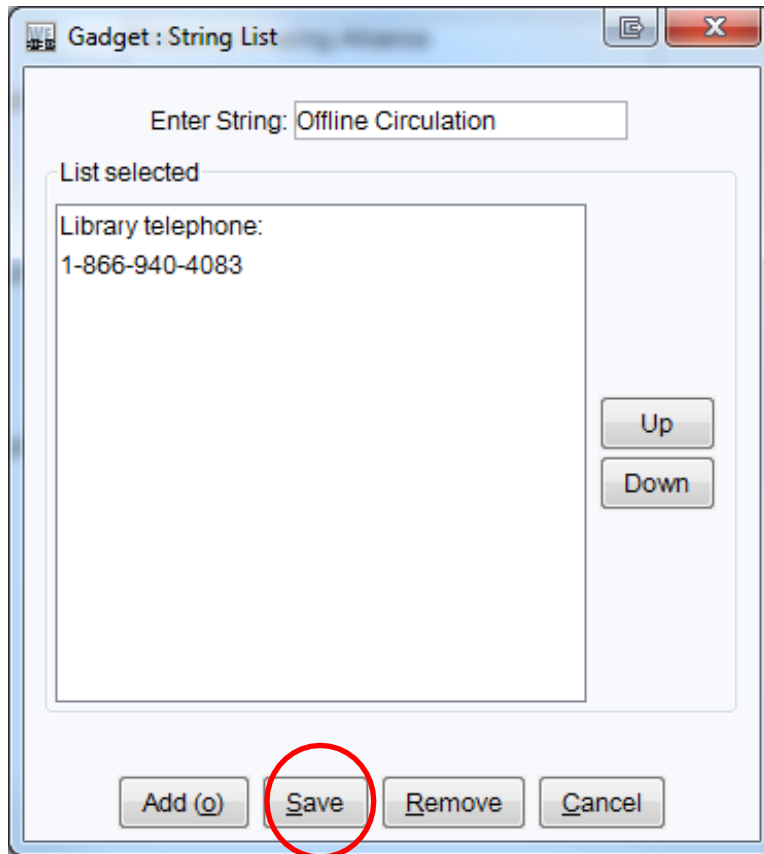


After making selections, click the “OK” button on the bottom of the “Gadget: Receipt fields” pop up box.



The receipt fields chosen will appear in the “Receipt fields” box.

If you would like to add information to the bottom of the receipt, click the gadget  to the right of the “Receipt footer” box. (Entering information in the “Receipt footer” box is optional)

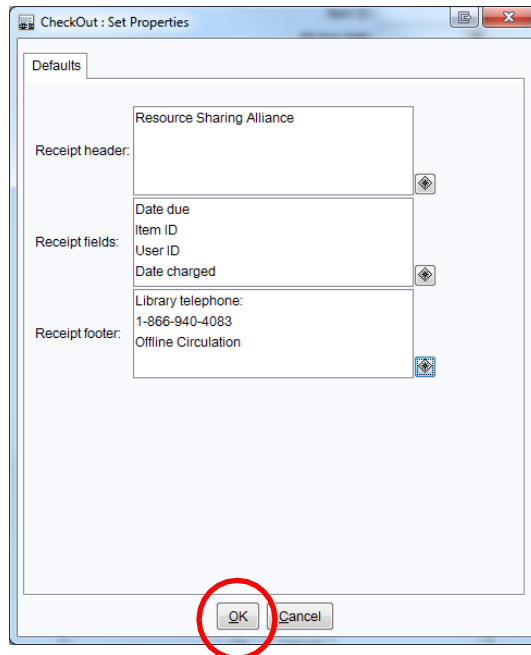


A “Gadget: String List” popup box will appear. The information entered in this popup box will appear on the bottom of the receipt. The “Enter String” box holds only 30 characters. If you want to add a message with more than 30 characters you will need to create multiple strings.

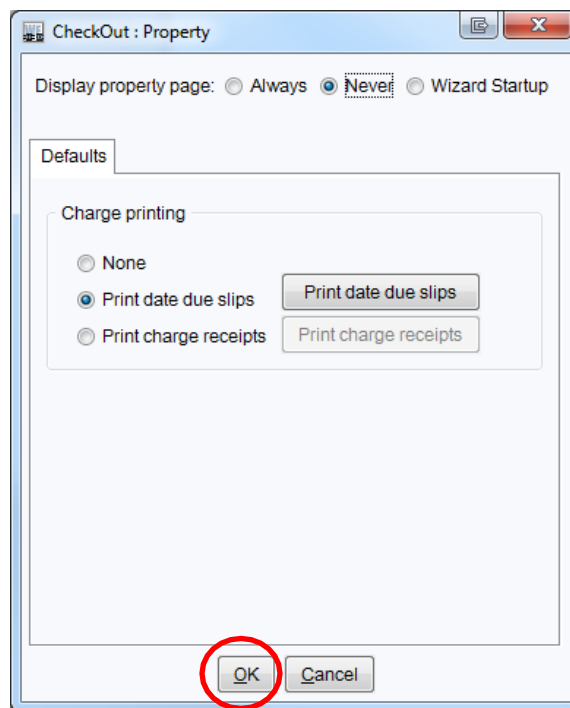
Some options are:

- Library telephone number
- Library website address
- Library hours
- Any free text message (In the above example “Offline Circulations” was added to the receipt)

Click the “Save” button when done.



Click the "OK" button at the bottom of the "CheckOut: Set Properties" popup box.



Click "OK" at the bottom of the "CheckOut: Property" popup box to save the receipt settings.

A receipt will now print during Offline Circulation.

Remember:

1. Receipt printers will work with transactions after setting Charge printing settings in the properties of the Checkout and Renew Item wizards of the Offline Module.
2. The receipt printer must be your Windows default printer to use the receipt printing function.
3. Receipts will contain limited information since the Offline module cannot query the server to retrieve the patron's name or the title of the item.
4. Due dates will not print on the receipt if "Default due date" is left blank in the session settings. The server cannot be queried to retrieve the items circulation rules while in Offline Mode.

Questions??

Contact the RSA help desk at rsahelp@railslibraries.info or RSA staff at 866-940-4083