

866-940-4083

### 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.

WF SirsiDynix Symphony WorkFlows: Item Search and D	isplay		↔ E = 1 ×
Eile <u>E</u> dit <u>W</u> izards He <u>l</u> pers <u>M</u> odules <u>P</u> refe	erence <u>T</u> ools <u>H</u> elp		RSA
Acquisitions   Cataloging Circulation+   Offline   O	utreach   Reports   Requests   Reserves   Sel	ection   Serial Control   Utility	
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Billing a User	cu <u>r</u> rent.		
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Users 🛞			
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		Detailed Display	

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.

WF Configuration		
Operate in Offline mode		
Host Information		
IP Address: rsa.alsrsa.org 👻		
Port: 5100		
Workstation		
Name: PCGUI-DISP 👻		
Login timeout: 60000 Seconds		
Show this window on next startup		
<u>O</u> K <u>C</u> ancel		

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.

SirsiDynix Symphony WorkFlows : Offline Mode	Set Session Settings		3
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Acquisitions Booking Cataloging	Circulation   Circulation+   Configuration   Finishe	ad Reports   ILL   Offline   Outreach   Reports   Requests   Reserves   Selection   Serial C	ontr
Unionlist Cat Unionlist Reports Utility			
Common Tasks	Set Session Settings ×		
The Office Session	Set Session Settings	and the second	7
		Review Settings Each Session	
CheckOut	Defaults		1
	User access:		
	Library:		Ш
	Current date: 11/20/2013 🛞		
2 Help	Current time: 13:19 (%)		
	Log directory: C:\Users\troxellm/Sirsi/Workfli		
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### 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.

SirsiDynix Symphony WorkFlows : Offline Mode:	Set Session Settings	
<u>File E</u> dit <u>W</u> izards <u>M</u> odules <u>P</u> reference	<u>T</u> ools <u>H</u> elp	RSANFP
Acquisitions Booking C Circ Lite Circul	ation   Circulation+   Contiguration   Finished Reports   ILL   Offline   Outreach   Reports   Requests   Reserves   Selection   Ser	ial Control   Unionlist Catal
Unionlist R., Utility	Col Comion Collinea V	
Common Tasks	Set Session Settings	
Offline Session	Review Settings Each Session	
User Registration	Defaults	
Checkoul		
1 Renew Item	Library: AG_ALS-PDC	
lenew Reserve	Current date: 01/02/2014	
R Help	Current time: 9:24 (*)	
	Log directory: C1Usersitroxellm/Sirsi/Workfl	

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.

Save in:	🕼 Deskto	)	*	े 🌮 🛄	
My Recent Documents Desktop	🔛 My Doct 3 My Com 9 My Netv 1 A Temp	iments puter ork Places File			
My Documents My Computer My Network					
My Documents My Computer My Network	File name	LOG			ΟΚ

Click the "OK" button at the bottom of the screen.

## Checkout

Open th	he "CheckOut" wizard in the Common Tasks group.	
-	## SirsiDynix Symphony WorkFlows : Offline Mode: CheckOut	
E	Eile Edit Wizards Modules Preference Tools Help	

uisitions   Booking   Catal   Circ Life   Circulation   C dict Ren   Litility	rulation+   Configuration   Finished Report	IS   ILL   Offine   Outreach   I	Reports   Requests   Reserves	Selection   Senal Control   Unioni
CheckOut X				
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Offline Session		-		
User Registration		Lies 13. 0 100083839		
	•	Item ID:		
		Alt due dato		
Discharging	Itom ID	Alt due date	Lines ID	1
Renew item	A133300009322	All due date	D150083839	
Renew Reserve			Englished and englished	
Help				
		Check Out Item Check	Out	

- 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 will be 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.

J SirsiDynix Symphony WorkFlows : Offline Mod	de: CheckOut				0 E	
Acquisitions Booking Catalogi Unionlist Catal Unionlist Reports Utility	ing Circ Circulation Circulation	+ Configuration   Fi	nished Reports   ILL   Off	ine   Outreach   Reports   F	equests   Reserves   Selection	Serial Contro
Common Tasks     Image: Charles Session       Image: Charles Session     Image: Charles Session       Image: Charles Charles     Image: Charles Session       Image: Charles Session     Im	CheckOut ×	Item ID	User ID: Item ID: At due date At due date	ek Out Wuser ID		

The "Exit" box will pop up.

Click the "Yes" button on the "Exit" box.

ile Edit Wizards Modules Preference Tools Help	RSA™
Acquisitions Booking Cataloging Circ Circulation Circulation	n+   Configuration   Finished Reports   ILL   Offline   Outreach   Reports   Requests   Reserves   Selection   Serial Contr
Unionlist Catal Unionlist Reports Utility	
Common Tasks	
Coffine Session	
User Registration	User ID:
CheckOut	Alt due date:
P Discharging	
1 Renew Item	Item ID Alt due date User ID
Renew Reserve	
2 Help	
SirsiDynix Symphon	ny WorkFlows : Offline Mode
Propertie	es have been changed. Would you like to save changes?
	Yes No
	Check Out ter Check Out

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.

Configuration		
Operate in Offline mode		
Host information		
IP Address: rsa.alsrsa.org 🗸		
Port: 5100		
Workstation		
Name: PCGUI-DISP		
Login timeout: 60000 Seconds		
Show this window on next startup		
<u>OK</u> <u>C</u> ancel		

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:

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File Edit Wizards Modules Preference Tools Help	RSANFP
Acquisitions Booking Cataloging Circ   Circulation   Circulation + Configuration   Finished Reports   ILL Offline   Outreach   Reports   Requests   Reserves   Sef	ection   Serial Control
Unioniist Catal   Unioniist Reports   Utility	
Common Tasks	
11 Office Session	
CheckOut	
B Dischargin Help	
I Renew ter Properties	
S Renew Reserve	
П Нер	

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

Select "Properties" from the drop down menu.

📰 CheckOut : Property	C X
Display property page: O Alw	ays 💿 Never 💿 Wizard Startup
Defaults	
Charge printing	
None	
Print date due slips	Print date due slips
Print charge receipts	Print charge receipts
Ōĸ	Cancel

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.

📰 CheckOut : Set I	Properties	
Defaults		
Receipt header:		
Receipt fields:	*	
Receipt footer:	۲	
	<u>Q</u> K <u>C</u> ancel	

Click the gadget \$ to the right of the "Receipt header" box.

Gadget : String List			
Enter String: Resource Sharing Alliance			
Up Down			
Add ( <u>o</u> ) <u>S</u> ave <u>R</u> emove <u>C</u> ancel			

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.

🕮 Gadget : String List			
Enter String:			
Resource Sharing Alliance Up Down			
Add (a) Save Remove Cancel			

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

E CheckOut : Set Properties			
Defaults			
Receipt header:	Resource Sharing Alliance		
Receipt fields:			
Receipt footer:		K	

The library name will appear in the "Receipt header" box.

Click the gadget <sup>●</sup> to the right of the "Receipt fields" box.

Gadget : Receipt fields		E X
List to choose from	List selected	
Current time		
Date charged		
Date due		
Item ID		
Library name		
User ID		
	OK Cancel	

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.

🚛 CheckOut : Set	Properties		
Defaults			
Receipt header	Resource Sharing Alliance		
Receipt neader.			
Receipt fields:	Date due Item ID User ID		
	Date charged		
Receipt footer:			
	(*)	R	
QK Cancel			

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)

Gadget : String List		
Enter String: Offline Circulation		
List selected		
Library telephone:		
1-866-940-4083		
	Up	
	Down	
Add ( <u>o</u> ) <u>Save</u> <u>R</u> emove <u>C</u> ancel		

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.

🚛 CheckOut : Set I	Properties	C ×
Defaults		
Receipt header:	Resource Sharing Alliance	(8)
Receipt fields:	Date due Item ID User ID Date charged	
Receipt footer:	Library telephone: 1-866-940-4083 Offline Circulation	
	OK	

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

CheckOut : Property	C X			
Display property page: O Always  Never O V	/izard Startup			
Defaults				
Charge printing				
None				
Print date due slips     Print date due slips	DS			
Print charge receipts	ots			

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 <u>rsahelp@railslibraries.info</u> or RSA staff at 866-940-4083