Offline Mode in WorkFlows
Procedural Guide for MSC Libraries

Purpose

Offline Mode enables basic circulation functionality in WorkFlows when network connectivity to the SirsiDynix Symphony server is unavailable. After connectivity is restored, library staff can submit a help desk ticket requesting to have their offline transactions loaded and an error report run.

Enabling Configuration Window

A configuration dialog window should always appear before inputting WorkFlows login credentials (Opening Offline Mode screenshot). This window allows for easy access to offline mode when needed.

Enabling When WorkFlows is Online:

1. Open WorkFlows as usual.
2. Click Preference > Configuration...
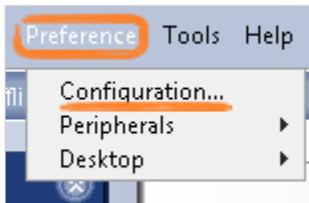
3. Check "Show this window on next startup".
4. Click OK. The setting change will go into effect the next time WorkFlows opens.

Enabling When WorkFlows is Offline

1. Try logging into WorkFlows twice. The configuration window will appear on the second attempt.
2. Check "Show this window on next startup" then proceed to opening WorkFlows in offline mode.

Opening Offline Mode

1. Close WorkFlows if already open.
2. Double-click the WorkFlows icon. A window should open (see **Enabling Configuration Window**).
3. Check "Operate in Offline Mode." The Host information and Workstation fields will grey out.
4. Double-check "Show this window on next startup" is selected.

5. Click OK. You will NOT be prompted to log in.
6. Double-check "SirsiDynix Symphony WorkFlows: Offline Mode" appears in the very top bar.

## Offline Session Settings

1. Select Offline toolbar > Offline Session wizard from the Common Tasks drop-down.
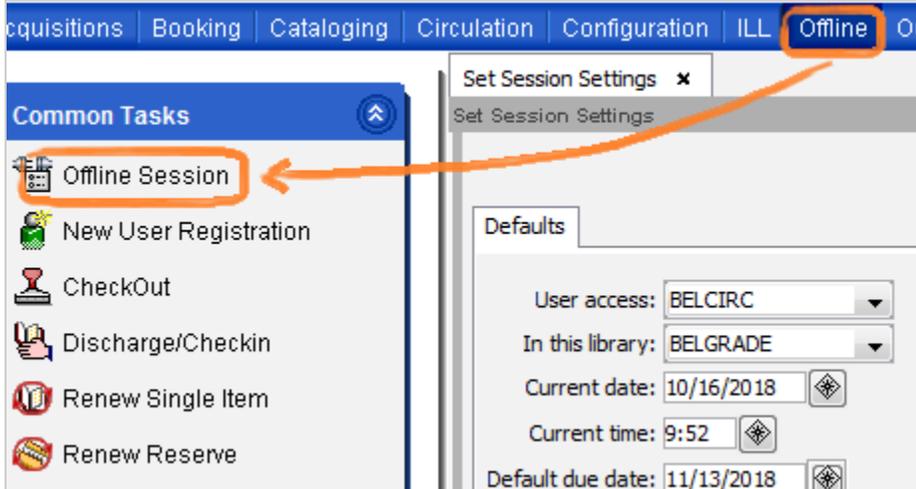
2. Check the "Review Settings Each Session" box if not checked already.
3. Select the correct User access and library from the drop-downs.
4. Use the gadgets to populate the Current date and Current time fields if they aren't already.
5. Use the gadget to populate a Default due date that reflects your library's most common checkout period, e.g. two weeks, four weeks. (You can adjust this at checkout.)
6. Do NOT do anything with Log directory.
7. Decide whether to check the "Use user delinquent list file" box (see below).
8. Click OK.

User Delinquent List File

The use of this setting is at the discretion of the library director and/or circulation staff. Keep in mind that the user delinquent list file is only as recent as its "user status generated on" date.
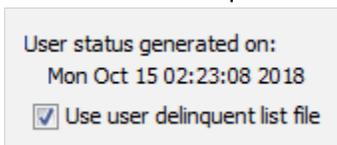
If Checked:

Staff will see pop-ups when a user is DELINQUENT, BLOCKED, or BARRED according to the user delinquent list file; however, staff cannot search the system or resolve any of these issues while in Offline Mode. Only DELINQUENT users will be able to check out after the error pop-up is closed.
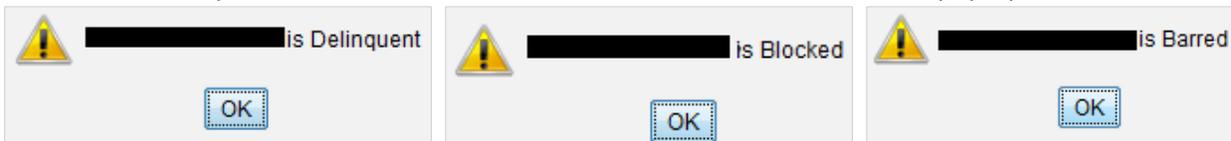
If Unchecked:

WorkFlows will assume all accounts are in good standing, meaning BLOCKED and BARRED users will be able to check out. Transactions on BLOCKED and BARRED accounts will load when connectivity is restored and a help desk ticket submitted. These transactions will NOT appear in an error report.

Checking Out

1. Open the CheckOut wizard (Offline module > Common Tasks drop-down > CheckOut).
2. Scan/type the user's library card. (Staff cannot search the system while in Offline Mode.)
3. Scan/type an item ID. It will appear in the checkout list, which is sortable by column heading.
   a. If using a scanner, check that the Alt due date is correct before scanning, as scanning automatically hits "enter" and checks out the item.
   b. If typing, click "Check Out Item To User" or press Enter.
   c. Once changed, the Alt due date field will NOT automatically revert to the session default. For example, if you set the default to four weeks in the future but changed Alt due date to check out an item due in two weeks, the checkout period will remain at two weeks until Alt due date is manually changed again using the gadget.

Card #:	23773100151872
Item ID:	
Alt due date:	11/13/2018 ⊛

Item ID	Alt due date «	Card #
33773100772017	11/13/2018	23773100151872

4. Click "Check Out To New User" when finished.

Renewing Items

- If an item already checked out to a user is charged by that user again, the item will be renewed when the transactions are uploaded to the SirsiDynix Symphony server.
- If an item is already checked out to a user, then checked out by another user, the item is discharged from the original user and checked out to the new user when the transactions are uploaded to the server.

Checking In

Checkin is discouraged for sharing group libraries. The system will put discharged items into transit without checking for holds and staff will be unaware of issues until MSC runs an error report. Many libraries wait to check items in until connectivity is restored.

If you decide to check items in:

1. Open the Discharge/Checkin wizard (Offline module > Common Tasks > Discharge/Checkin).
2. Scan/type an item ID. It will appear in the discharge list.
   a. If using a scanner, check that the Date of discharge is correct before scanning, as scanning automatically hits "enter" and discharges items.
   b. If typing, click OK or press Enter.
   c. The Date of discharge auto-populates to the current day. Change by using the gadget.

Item ID:	
Date of discharge:	10/16/2018 ⊛

Item ID	Date of discharge
33773100772017	10/16/2018
33773100731895	10/16/2018

3. Optional: click "Clear Discharge List" to refresh the discharge list.

Registering New Users (Not Recommended)

Most MSC libraries wait to register new users until after connectivity is restored because the New User Registration wizard will NOT check for duplicate accounts or lost cards while in Offline Mode.

If you decide to register new users, record the information in a second place for later comparison.

Renewing Users

Staff cannot renew users while in Offline Mode. Users with outdated privilege will be BLOCKED at checkout if "Use user delinquent list file" was selected in the Offline Session settings.

Closing Offline Mode

When network connectivity to the SirsiDynix Symphony Server is restored:
1. Close WorkFlows.
2. Double-click the WorkFlows icon.
3. Uncheck "Operate in Offline Mode."
4. Double-check "Show this window on next startup" is selected.
5. Log in with your library's credentials as usual.
6. Select the module you want to use (WorkFlows will initially reopen with the Offline module selected, but the wizards are unavailable when not in Offline Mode).
7. Open a help desk ticket saying your library went into Offline Mode. MSC staff will then load your transactions and send you an error report listing users not found, items already checked in, etc.