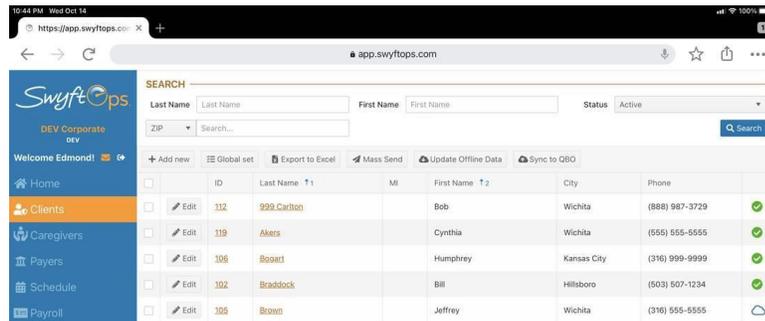## How To Use The SwyftOps Admin Offline Mode

1. Mark clients for offline by clicking the cloud icon while the system is online (connected to wi-fi or data). When successful, a green check mark will replace the cloud.

2. Keep SwyftOps open at the client search screen, do not log out.

3. Go to the client location, access the client profile, make the changes needed in offline mode (example: complete an assessment and save). A gold check mark will appear in place of the green check mark indicating there are offline data changes.
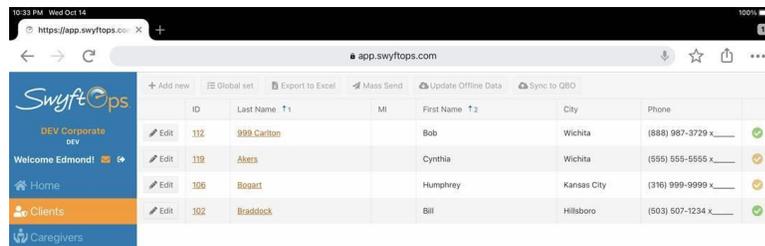

4. Keep SwyftOps open, logged in, and at the client search screen. Leave the client's location.

5. When the device connects back with wi-fi or data, the system initiates an automatic sync – you must be at the client search screen for this to happen.

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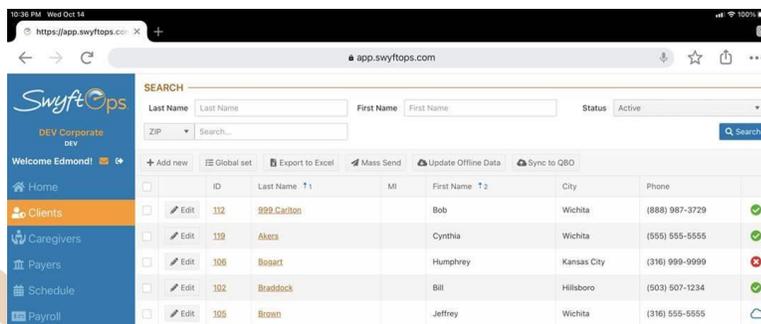© 2019 SwyftOps & Aegle Technologies

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6. If there is a sync conflict – an error will display. This happens when another user makes changes to one of the clients that was updated offline. This can only be manually resolved by the user.
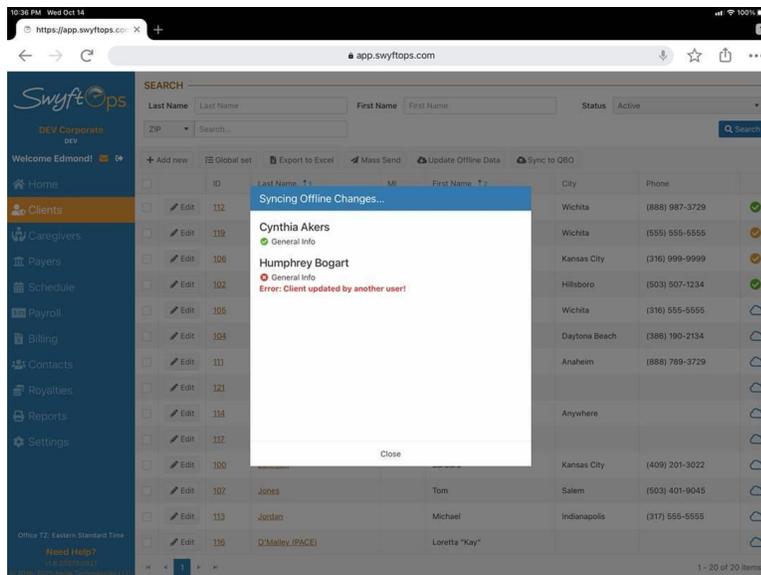
7. Conflicts will also show with a red x where the green or gold check mark previously showed.
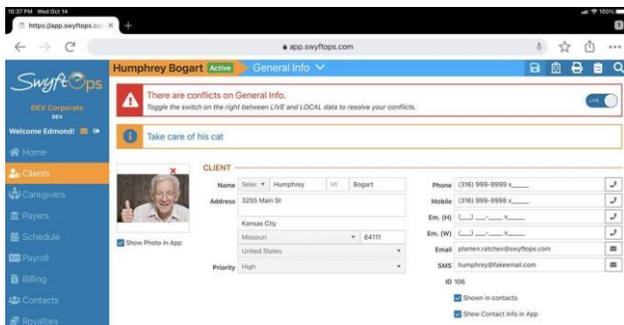

8. Click Edit to resolve the issue.

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9. There is a toggle switch on top to view live data and offline data. The user has to see what has changed and apply the offline changes (if needed) to the live view, then Save. This resolves the conflict.
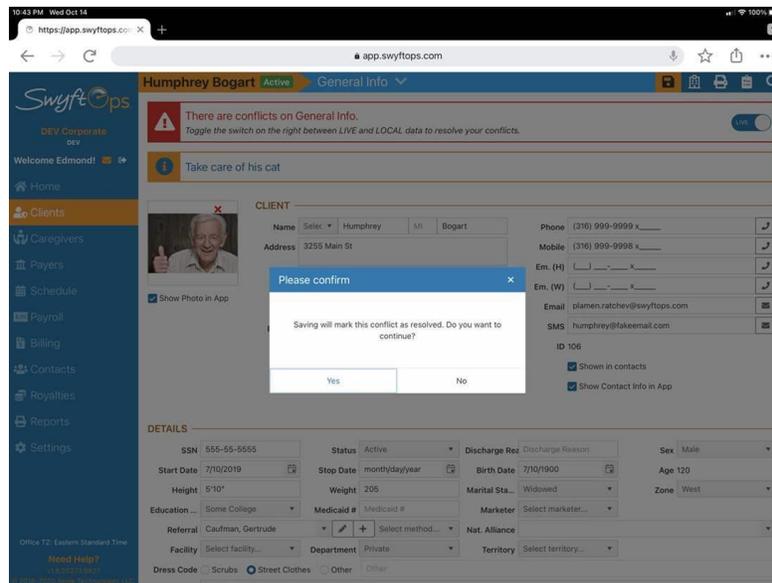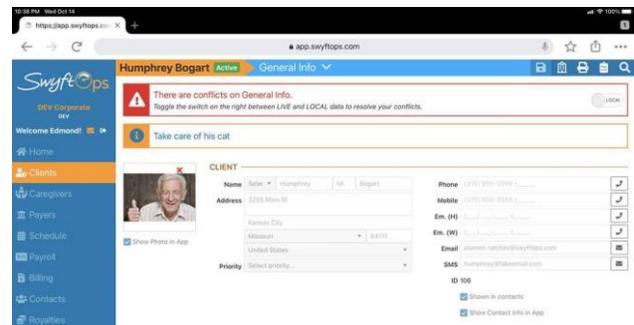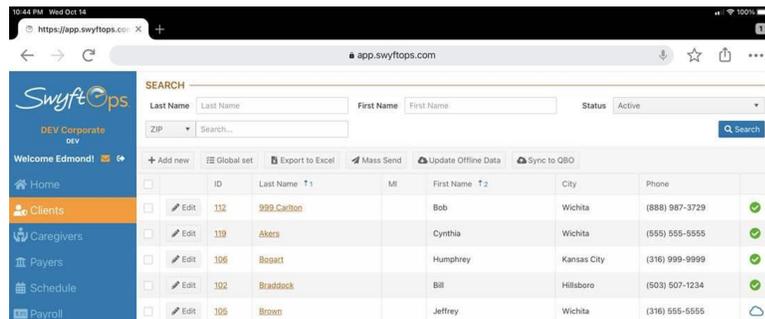

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How To Use The SwyftOps Admin Offline Mode

10. Once the conflict is resolved, the red x icon will no longer display.

11. The Offline changes (the data collected while offline) auto-sync into SwyftOps only can happen/be triggered when all three of these items listed below are happening concurrently:

   ▪ The system is connected online (wi-fi or data)
   ▪ There are offline changes
   ▪ The user is on the client search screen

   *If auto-sync doesn't occur, a refresh of the browser page may help.

12. The Update Offline Data button should ONLY be used/clicked when the user is expecting to go back in offline mode and need to refresh any offline data they may have. This WILL delete any pending offline changes that have not been synced.
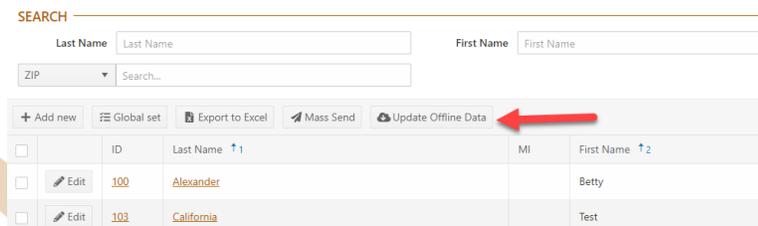
*Users should NOT clear the browser cache, this will delete the offline data.

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