

Symphony 4.1.1

PC WorkFlows Installation Instructions

Updated June 14, 2024

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Pre-installation Information

Note: On workstations running the WorkFlows Java[™] client, SirsiDynix recommends setting the virtual memory association to equal twice the amount of physical memory, at minimum. Please work with your PC administrator to check the virtual memory setting on each workstation running the WorkFlows Java[™] Client and increase the memory if necessary.

Minimum Workstation Requirements:

SirsiDynix Symphony Release	OS/Platform (4)	Processor	RAM ^(1,2)	Disk Space for Client	Monitor Resolution	TCP/IP network
4.1.1	Windows 8.x	Minimum: 800 MHz	Minimum: 4GB	200MB	1024 x 768 or better	Y
	Windows 10	Suggested: 1 Ghz	Suggested: 8GB			
	Windows 11					

*WorkFlows is not supported on any versions of Windows 8 RT.

WorkFlows staff client requirements do not affect OPAC stations, which will continue to require a browser only.

Operating Systems:

Users must be using one of the above operating systems to install the Java WorkFlows Client: If the Operating Software or hardware you are using is not listed above, SirsiDynix does not currently support it.

Setting Permissions

ALL users MUST be able to store files in the installation directory AND in the documents and settings directory.

1. Change permissions to WorkFlows application folder to Read/Write and Execute on the

following locations:

- c:\Program Files (x86)\Sirsi (and all in it)
- c:\users\(loginuser)\Sirsi\WorkFlows (and all in
- it)

Test the permissions by doing the following:

- Logoff of the computer and login as a "normal" or "unprivileged" user
- Start WorkFlows and Login to an instance
- Click the 'Reports' tab
- Click the 'Report Session' link on left

- Check 'Notify Owner when report is finished' option.
- Click 'OK'
- Close WorkFlows. You will be prompted to save your changes. Click 'Yes'.
- Restart WorkFlows and Login into an instance.
- Check to see that the checkbox is now checked. If it is, the permissions are OK. Uncheck the box and click 'OK. Exit WorkFlows. If the checkbox is NOT checked, permissions are not set properly. Please reset the permissions as described in #1. If you continue to have difficulties setting permissions, ensure the UAC is turned off in Vista or Windows 7.

Installing the Symphony 4.1.1 WorkFlows Client

INFOhio recommends installing the WorkFlows Client under the library user account. It offers the option with the least chance of installation problems and *does not require administrator involvement* after the initial installation.

Installation under library user account: Each library user with *administrative privileges* can download and install the client, eliminating the need for an administrator to perform any further updates or installations. If the tech person prefers to do the installation, they can log on to the machine as each user and perform the installation.

Not Recommended: An administrator with the ability to install and set privileges on the machine can install the client for the other users and set permissions on the client that will allow all the other users to run/share that installation. This option requires the administrator to perform the client updates.

WARNING: Often this will necessitate the uninstallation and reinstallation of WorkFlows.

Initial Installation Instructions:

Note: These instructions assume you are installing the WorkFlows client for the first time or have uninstalled the WorkFlows client and need to re-install the client. If this is not the first time you have installed the WorkFlows client, perform an 'update' which takes less time. (*Please refer to Update existing WorkFlows found later this document.*)

1. Backup Your WorkFlows Property File

If you have a previous version of WorkFlows installed, please make a copy of the existing WorkFlows Property files in case they need to be restored after the application is updated. The Property files on the Windows workstations are typically located in the following directory:

C:\Program Files (x86)\Sirsi\JWF\Property

2. Download the Symphony WorkFlows Client

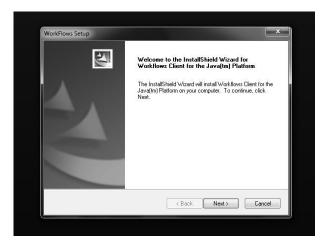
The 4.1.1 WorkFlows Java client is available for ITC and library staff to download:

https://www.infohio.org/lsp-handbook/category/handbook-setup

Click on *PC* – *WorkFlows Installation*, then *Right Click* on the Download link for the client download (see image below.) Depending on your browser, Choose *Save Target As*, or *Save Link As*, to save the file on your computer. Saving the file on your desktop will make it easier to locate. If you are unable to download the client with the Download link, try the Alt Download link.



3. *If you downloaded the .ZIP file, double click* on the file to unzip the contents and start the installation. If you used the Alt Download link to download the .EXE, just double-click the EXE to start the installation.



Follow system prompts and accept all defaults.

- 4. Configuration screen displays:
 - **Complete** the Host and Port information. **NOTE:** If IP address and Port are unknown, contact your ITC.
 - Check "Show this window on next startup".

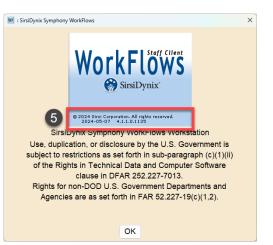
WF : Configuration ×
Operate in Offline mode
Host information
IP Address: 🗸 🗸
Port: 5100
Workstation Name: PCGUI-DISP ~
Login timeout: 60 Seconds
Show this window on next startup
OK Cancel

- **Do not** change any other default settings.
- *Click* the 'OK' button at the bottom of the window.
- Enter your User ID and PIN. NOTE: If login is unknown, contact your ITC.

Host:		
Port:		
User ID:		
Pin:		

WF Login	x
User ID: PIN:	
	OK Cancel

- 5. **Select** Help/About from the top menu bar. Confirm that the date/version number matches that provided by your ITC.
- The INFOhio logo should appear at the top right-hand corner of the screen. (If this is not the case, please contact your ITC).
- From the top taskbar, select Preference/Desktop/Desktop setup verify that "Multiple windows mode" is checked. Select TABBED WINDOWS.
- Close WorkFlows (then restart WorkFlows) for this setting to take effect. As you close WorkFlows, the message "The software was successfully installed" will display. *Click* "close".



Complete the Process

Set Toolbars

If necessary, *Click* the toolbar name that displays, it will be *the toolbar identified with the user login access*. This will update the menu options.

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Check Item Status			
🛱 Save Properties			
Preio			
Oser Hainfenance			<u> </u>
Checkout, Checkin, Renemals and Fine	•		
Special Circulation Functions			LIB1
Helds Halmberrance			LIDI
Rem HaleAmance			
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Authority Naintenance			

Set Preferences

From the Menu Bar:

- 1. Click Preference
- 2. Desktop
- 3. Desktop Setup

WF Un	nicorn V	WorkFlows			_		
<u>F</u> ile	<u>E</u> dit	<u>W</u> izards	<u>M</u> odules	<u>P</u> reference	<u>T</u> ools	Win <u>d</u> ow	<u>H</u> elp
ADM		RC1 CIRC	2 CIRC3	Configur <u>a</u> t	:ion	Configu	uration LIB1
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Che	ckout,	Checkin, Rei	newals and Fi	nes (N	<u>D</u> eskto	op Setup

On the Themes drop down menu:

4. Select the theme or color you prefer.

NOTE: Never select Classic!!

- 5. Verify Multiple Windows mode is checked.
- 6. Place a check by tabbed windows mode.
- 7. Click OK.

	WF Preference : Deskto	p Setup X
	Default help topic:	Figured
	Opening Wizard:	None
		Server specifies format American (MM/DD/YYYY)
		 Arabic (Hijri) Asian (YYYY/MM/DD)
	24-hour clock for	O European (DD/MM/YYYY) mat
	Default toolbar: Themes:	Cataloging ~ Fall 4 ~
3	 Multiple windows Tabbed windows Tabbed windows 	
		OK Cancel

Last Updated July 2023

Set the Print Pathway

When WorkFlows is first loaded onto a computer or if a computer has been reimaged, the Report Session settings will need to be configured. You will also need to do it if you get the error message, "The specified path was not found."



 Please see the <u>PC – Setting the Print Pathway</u> documentation found in the Getting Started section of Setup in the <u>Library Services Handbook</u> for instructions on how to set the default settings for opening reports.

Install the Barcode Font

Since this computer will be used to print barcodes, you will need to install the appropriate barcode font. Use the Guide instructions found under the PC – Barcode Font on this webpage:

https://www.infohio.org/lsp-handbook/category/handbook-setup

Additional Notes

NOTE: After installing WorkFlows, have the library staff login in TWICE before leaving. The first time display a patron to make sure the photo appears, set the application to use for printing, etc. The second time, make sure the application used for printing is saved (have staff open a FINISHED report) and the photos continue to appear.

(Optional) Restore Property Files

When using WorkFlows, if you notice that some features are not performing as expected, be certain to restart your WorkFlows client. If the problem persists, contact your INFOhio Provider of your regional ITC and consider restoring your Property files from the backup created at the beginning of the process.

Update existing WorkFlows Installation

To update the WorkFlows client on a PC: With administrative privileges, right click on the WF icon and select "Run as administrator". The message "The following file needs upgrading. Contact your system administrator" indicates that the installed version of the software is not the proper version.

💹 Upo	iate X
0	The following file needs upgrading. Contact your system administrator. Installation package
	<u>ok</u>

NOTE: If during the update process, you receive the "Error 2602", as reflected in the image below, it will be necessary to completely uninstall / re-install WorkFlows.

Workflows Installer Information	X
Error 2602.The File table end '_AF3D30C4F853934A01FF8 associated entry in the Media	C3BCE6A7E9A' has no
ОК	

With administrative privileges, right click on the WF icon and select "Run as administrator".

NOTE: These instructions apply to users that already have the Symphony WorkFlows client installed and the user has administrative privileges. If you are not sure you have the appropriate permissions to do the upgrade, you should contact your local technical coordinator or network administrator.

If the client is updated by an administrator, permissions must be set on the files so that all the appropriate users on the machine have the access needed to run the client.

The following permissions must be set:

User needs full control access to their own Home directory User needs full control access to c:\Program Files\Sirsi\ or c:\Program Files (x86)\Sirsi\

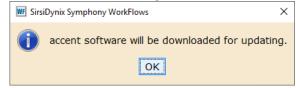
1. *Right-Click* on the WorkFlows icon and select "Run as administrator". Log into WorkFlows with your normal userID and PIN.

WorkFlows	X C & & ®
	Open Enter
	🕞 Run as administrator
-	Open file location
	☆ Add to Favorites

2. You will be prompted to 'update staff client.' Click the YES button:



3. You will receive a message that the software will be downloaded for updating. Simply click 'OK'.



4. Once the download is complete, you will be prompted to 'Install Now'.



5. Click 'Finish' when the update is complete.



6. Log into WorkFlows with the library staff credentials.



- 7. Once finished, make certain the library staff can properly log into WorkFlows at least *twice* using their own credentials for the workstation.
- 8. Make certain that the expected labels are displayed and the report options on INFOhio reports are displayed:

Example of proper labels in Edit Item:

Edit Item 🗴								
Edit Item								2
# # #	F7							
Search for:	potter							1
Index:	Title							
Library:	ALL							
Current:	Rowling, J. K Harry Potter and the Chamber of	Secrets CLASS	ROOM ROW ID:326	12300004359 C	trl#:a16390 Copy	:13		1
KEYWORD T	itle potter, ALL: 33 records							
Title		Author			Pub. Info.			Phys. Desc
	e book! [videorecording] : a kid's video guide to					m Ideas, Inc., 2005		1 videocas
	otter : artist, poet, slave	Hill, Laban Carrick	ς.		New York : Little,			[42] p. : cd
	nting and sculpture and the chamber of secrets	World Book, Inc. Rowling, J. K.			Chicago : World	Book, c2013. Levine Books, 1999.		1 online res 341 p. ; 20
	and the Chamber of Secrets	Rowling, J. K.			New York : Levin			341 p. , 20
The second s								
	r and the Chamber of Secrets	Rowling, J. K.				lastic, [2000], c1999		341 p. : A
	r and the Chamber of Secrets	Rowling, J. K.				lastic, [2000], c1999		341 p. : 4
Haros Dottor								
Description	Call Number/Item		Price:	\$0.00				ui 241 n 1
Description	Call Number/Item Potter and the Chamber of Secrets - Rowling, J. K. ASSROM ROW - DLHS		Shelf location:	AVAILABLE	Item type: Current status:	CLASSROOM AVAILABLE	Ongoing checkouts: Ongoing renewals:	2
Description	Call Number/Item Potter and the Chamber of Secrets - Rowling, J. K. ASSROOM ROW - DLHS 325(120000369) - 1 - CLASSROOM - AVAILABLE		Shelf location: Material type:	AVAILABLE BRAILLE	Item type: Current status: Funding source:	CLASSROOM AVAILABLE OTHER	Ongoing checkouts: Ongoing renewals: Checkouts to date:	2 2 0
Description	Call Number/Item Potter and the Chamber of Secrets Potter and the Chamber of Secrets - Rowling, J. K. ASSROOM ROW - DLHS 32612300003609 - 1 - CLASSROOM - AVAILABLE 32612300003617 - 2 - CLASSROOM - LOST-CLAIM		Shelf location: Material type: Curricular area:	AVAILABLE BRAILLE none	Item type: Current status: Funding source: Grade level:	CLASSROOM AVAILABLE OTHER none	Ongoing checkouts: Ongoing renewals: Checkouts to date: Renewals to date:	2 2 0 0
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Example of Report Options in INFOhio Report:

Schedule New Reports × Schedule New Reports : Schedule LBL :	Item Labels	
Basic Search String Item IDs Tit	tle Selection Call Number Selection Item Selection Sorting Label Options	
Label Type(s)		-
Barcode Labels Spine Label	els	
Spine Label Options		
Font Size: 8 Start on Label #:		
Send Email To:		
Barcode Label Options		-
Print School District		
Print School/Library		
Insert Page Break on Sort Key	y	
Start on Label #:		
Optional Text: Send Email To:		
Page Format:	Full Page Skip Column Skip Rows	
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		2
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Uninstalling Symphony 4.1.1 WorkFlows Client (PC)

1. Backup Your WorkFlows Property File

If you have a previous version of WorkFlows installed, please make a copy of the existing WorkFlows Property files in case they need to be restored after the application is updated. The Property files on the Windows workstations are typically located in the following directory:

C:\Program Files (x86)\Sirsi\JWF\Property

- 2. From the computer's Control panel, *select* the Add/Remove Programs utility (XP) or Programs & Features (Windows Vista/7/8/10/11).
- 3. Use the utility to *remove* the **I** Java WorkFlows program from the computer.
- 4. Afterwards, *delete* the folder C:\Program Files\Sirsi (or C:\Program Files (x86)\Sirsi) and any remaining contents.
- 5. *Delete* the folder C:\Documents and Settings\(*loginuser*)\Sirsi (Windows XP) or C:\Users\(loginuser)\Sirsi (Windows Vista/7/8/10/11).

List of INFOhio Firewall Access

https://www.infohio.org/images/ZOO_DOCS/wfhandbook/Setup/Install/SETUP_INSTALLFirewallAccess.pdf