



Symphony 3.7.1

PC Workflows Installation Instructions

Updated July 30, 2021

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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:

| WorkFlows Staff Client - Requirements | | | | | | |
|---------------------------------------|---|---|--|-----------------------|----------------------|----------------|
| SirsiDynix Symphony Release | OS/Platform (4) | Processor | RAM(1,2) | Disk Space for Client | Monitor Resolution | TCP/IP network |
| 3.7.x | Windows 7 (32-bit and 64-bit) Windows 8 or 8.1 (32-bit and 64-bit)* Windows 10 (64-bit) | Minimum: 800 MHz Suggested: 1 Ghz | Minimum: 1GB Suggested: 2GB | 200MB | 1024 x 758 or better | Y |

*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 the '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 in to 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 the #1. If you continue to have difficulties setting permissions, ensure the UAC is turned off in Vista or Windows 7.

Installing the Symphony 3.7.x 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, he can logon 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 3.7.x WorkFlows Java client is available for ITC and library staff to download:

<https://www.infohio.org/library/workflows-handbook/category/handbook-setup>

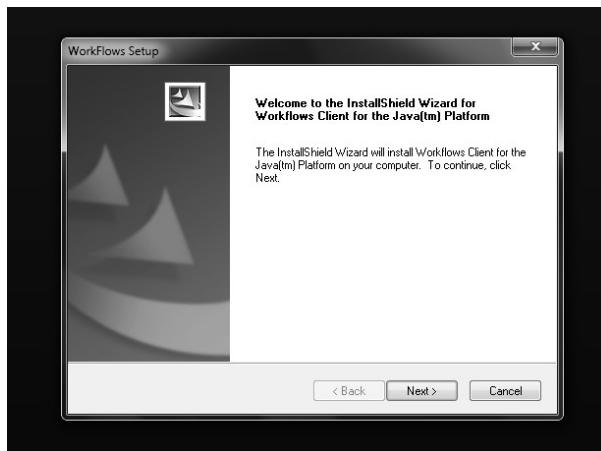
Click on **PC – WorkFlows Installation**, then **Right Click** on the **Download** link for the client download (see image below.) Depending on your browser, Choose *Save Target As*, or *Save Link As*, to save the file on your computer. Saving the file on your desktop will make it easier to locate. If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

Setup

INSTALLATION

- [MAC - WorkFlows Installation](#)
- [MAC - Barcode Font](#)
- [PC - WorkFlows Installation](#)
- [PC - Barcode Font](#)
- [WorkFlows Troubleshooting Checklist](#)

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.



After verifying that the build number matches the build number sent by your ITC, follow system prompts to accept all defaults.

A message may appear stating "custom.jar found, not written". This is normal. Message appears "Install will now launch Workflows Client".
Click OK.

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".

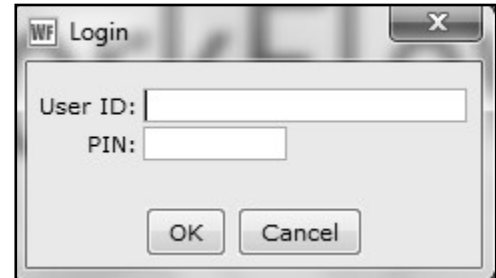
- **Do not** change any other default settings.
- **Click** the 'OK' button at the bottom of the window.
- **Enter** your User ID and PIN.
NOTE: *If login is unknown, contact your ITC.*

Host: _____

Port: _____

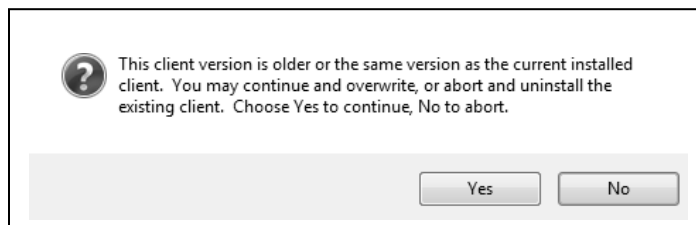
User ID: _____

Pin: _____



5. **Click** OK. You will be prompted to update. **Click** Yes.

If this is a new install, you may see the message shown below. If you do, it means your copy of Workflows is up-to-date and it is not necessary to do the additional update. You can click 'No' to abort so you don't have to go through the update process.



Message "Staff client is exiting – restart to install" **Click** OK." You do NOT need_(at any time) to restart the computer, just restart Workflows when prompted to "restart".

6. Message "Setup has finished installing Workflows on your computer". **Click** "Finish"
7. **Click** the WorkFlows icon on your desktop again. It will automatically perform additional updates. **Select** next, yes... to accept defaults.
8. Message: "Install will now launch Workflows Client..." **Click** "OK".
9. Configuration screen appears, **click** OK; **login** as above.

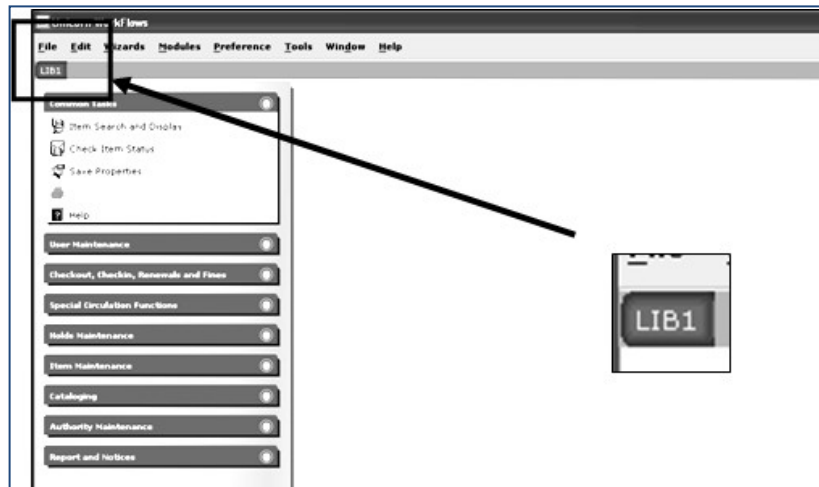
NOTE: *Continue to "update" the software until you are NO LONGER prompted to update. If prompts **DO NOT** stop, report to the ITC staff.*

10. **Select** Help/About from the top menu bar. Confirm that the date/version number matches that provided by your ITC.
11. The INFOhio logo should appear at the top right-hand corner of the screen.
(If this is not the case, please contact your ITC).
12. From the top taskbar, **select** Preference/Desktop/Desktop setup – verify that “Multiple windows mode” is checked. **Select** TABBED WINDOWS.
13. 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

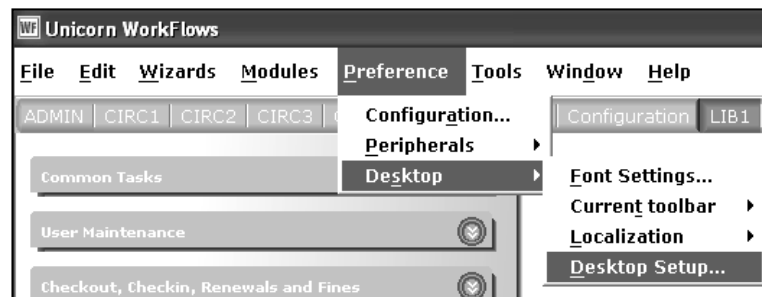
If necessary, **Click** the toolbar name that displays, it will be *the toolbar identified with the user login access*. This will update the menu options.



Set Preferences

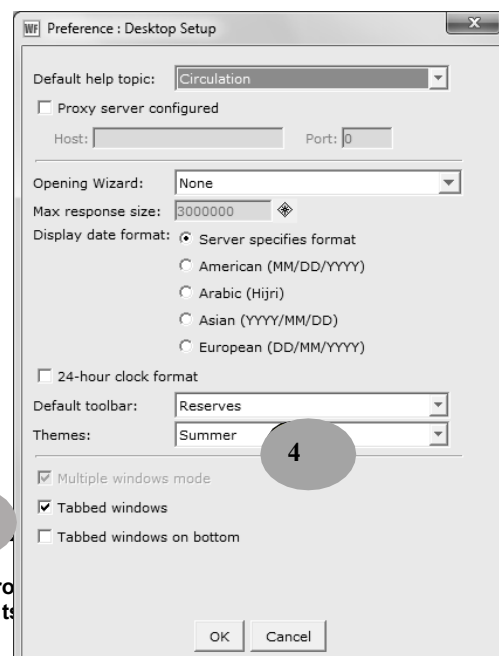
From the Menu Bar:

1. **Click** Preference
2. Desktop
3. Desktop 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.



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 [PC – Setting the Print Pathway](#) documentation found in the Getting Started section of Setup in the [Workflows Handbook](#) 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/library/workflows-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

As WorkFlows is utilized, 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.

ADMINISTRATOR NOTE: If using Windows 7 and getting an error message (insufficient privileges) please set the following “run as administrator”:

Set Workflows to Run as Administrator

(Resolves the problem with viewing reports from Workflows and not being able to save reports when using MS Office or MS Office menus not being available)

STEP #1: Right Click on your shortcut and choose Properties

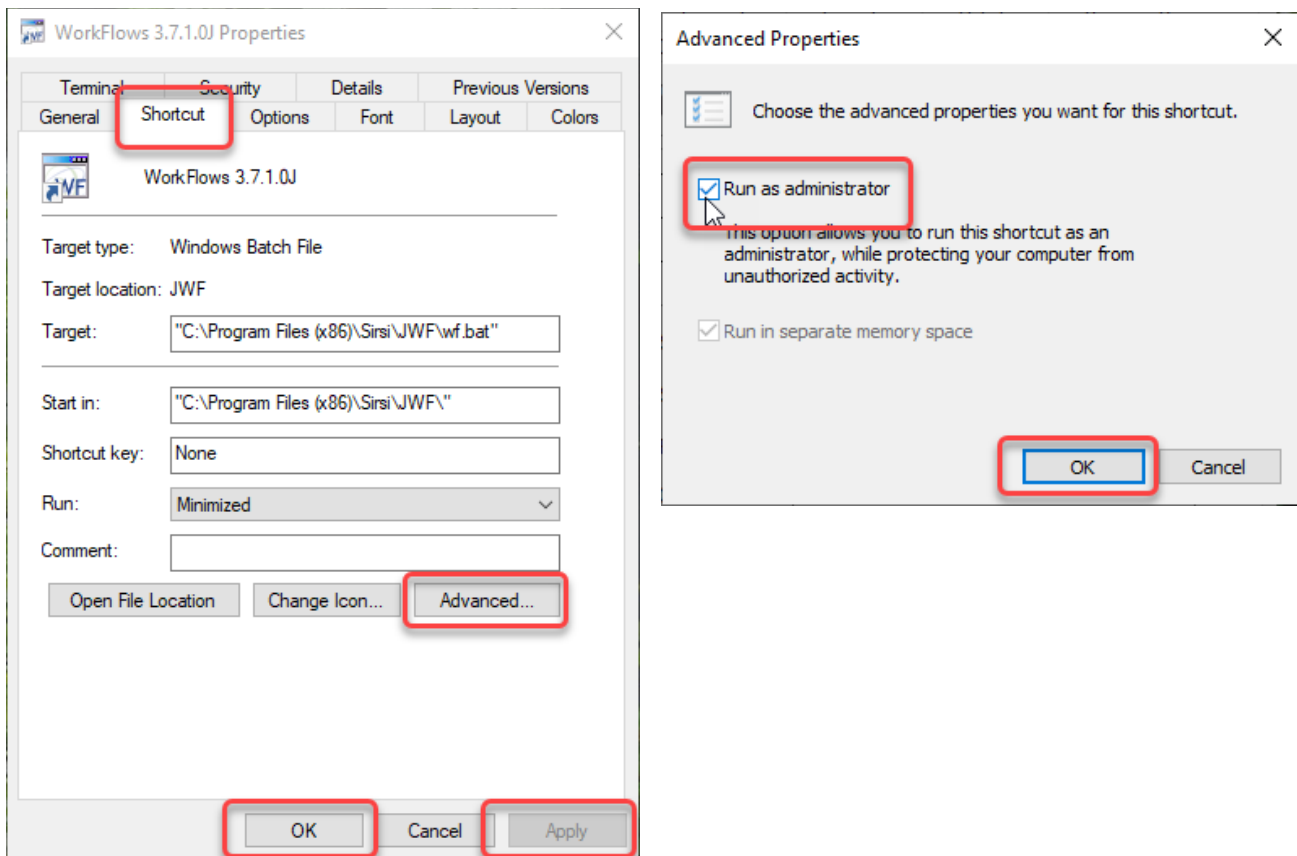
Click on shortcut tab

Choose advanced button

Checkmark “Run as administrator”

Click on OK on the Advanced Properties window

Click on Apply and then OK on the Workflows Properties window

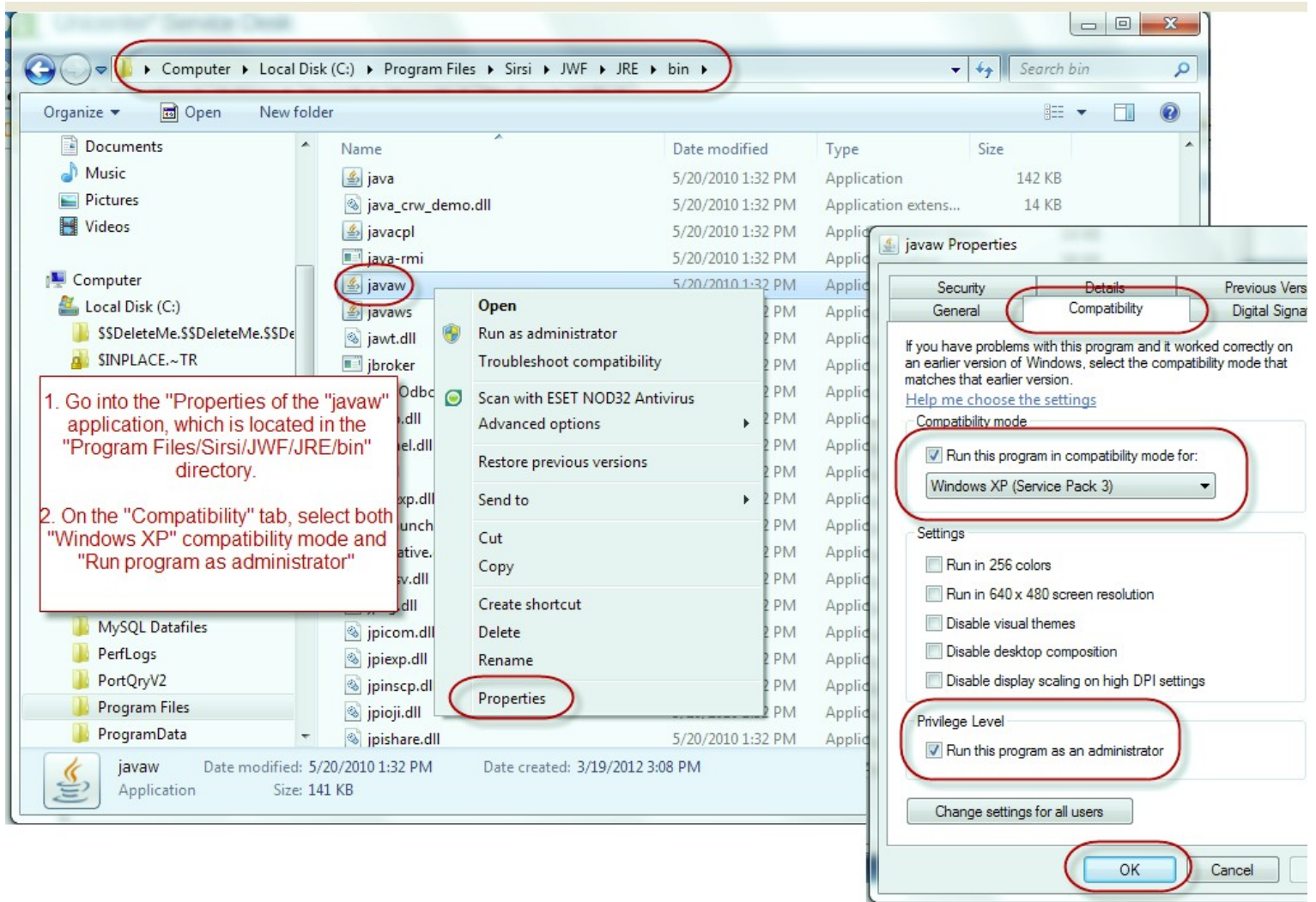


STEP #2:

In Windows Explorer, go to: C:\Program Files (x86)\Sirsi\JWF\JRE\bin

Right click on the javaw.exe file and choose properties

Choose the Compatibility tab Checkmark as shown:



Update existing Workflows Installation

There are two ways to update the Workflows client on a PC:

- 1) **Option 1:** With administrative privileges, use the “Update Staff Client” in WorkFlows.
- 2) **Option 2:** On a date determined with the INFOhio Provider and school staff, users with administrative privileges must perform installations under their own account.

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.



Option 1: With administrative privileges, use the “Update Staff Client” in WorkFlows

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.

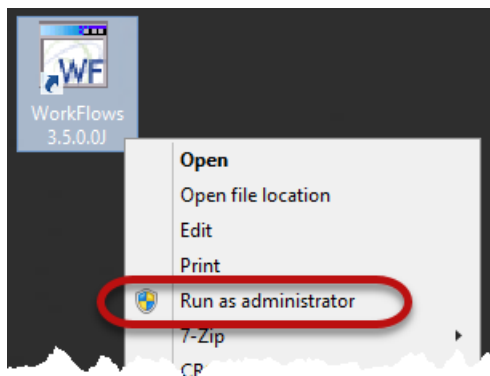
If the client is updated by an administrator, permissions must be set on the files so that all the appropriate users on the machine have the access needed to run the client.

The following permissions must be set:

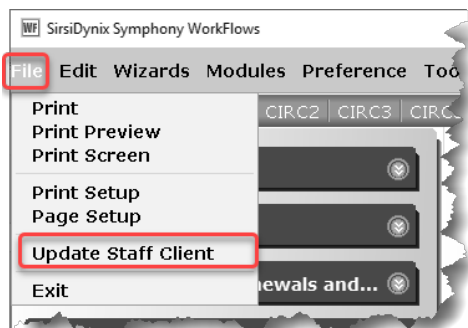
User needs full control access to their own Home directory

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

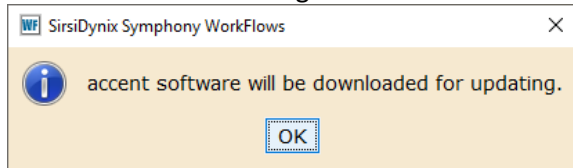
1. **Right-Click** on the Workflows icon and select “Run as administrator”. Log into Workflows with your normal username and PIN.



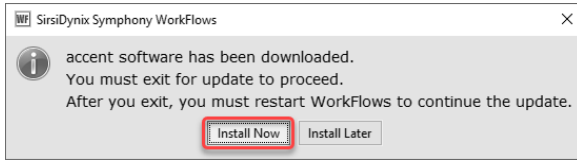
2. From the ‘File’ menu, select ‘Update Staff Client’:



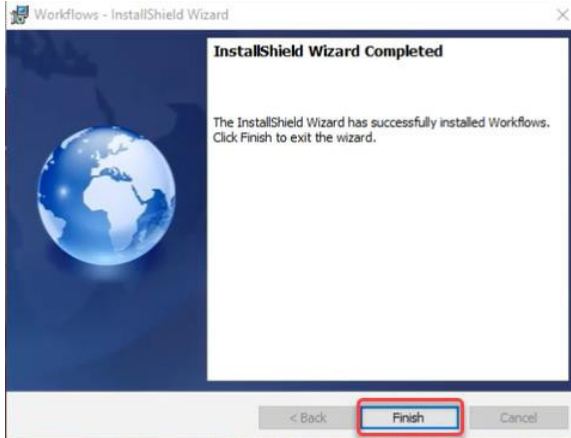
3. You will receive a message that the software will be downloaded for updating. Simply click ‘OK’.



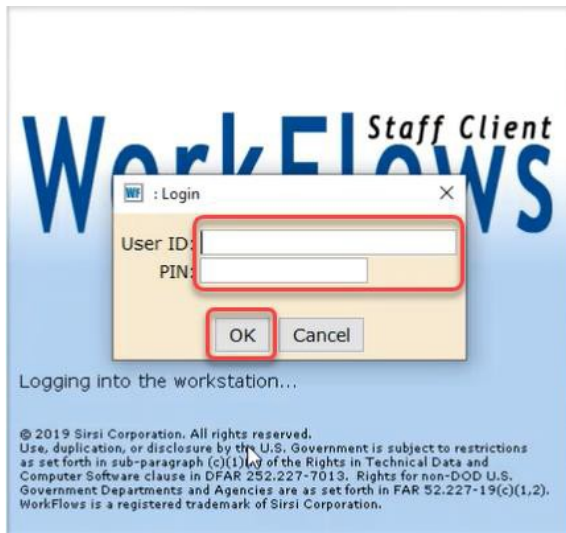
4. Once the download is complete, you will be prompted to 'Install Now'.



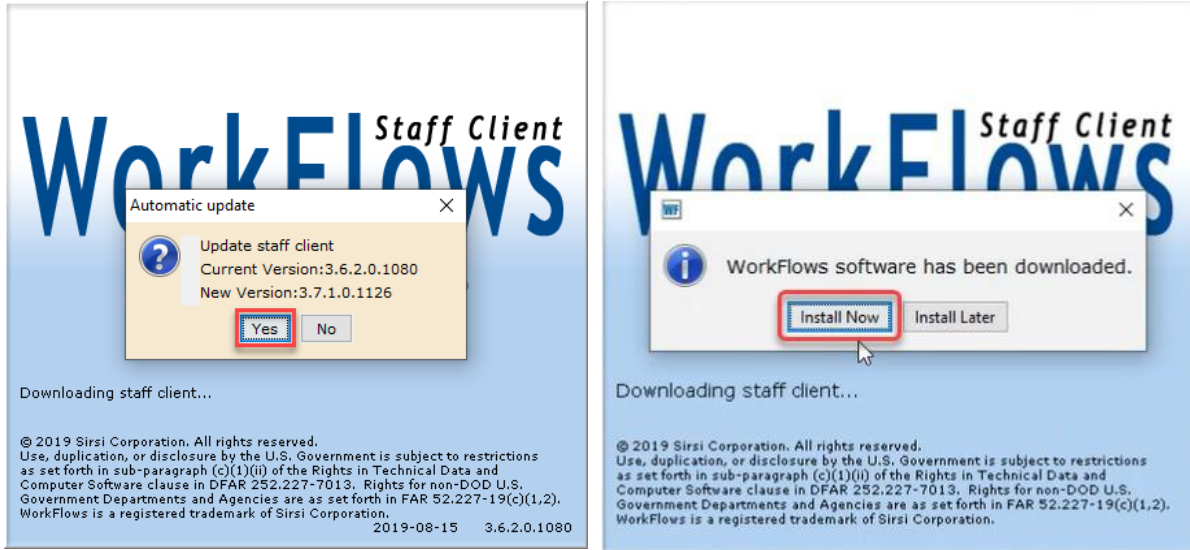
5. Click 'Finish' when the update is complete but be forewarned that the update is not truly finished.



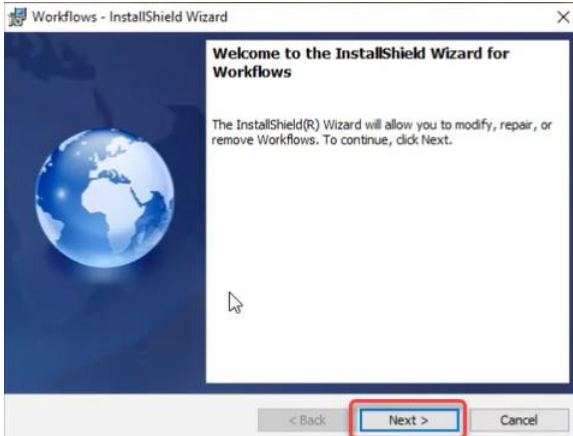
6. Log into WorkFlows with the library staff credentials.



7. A prompt will be presented to update the staff client again. Click “Yes” to proceed, and then “Install Now”:



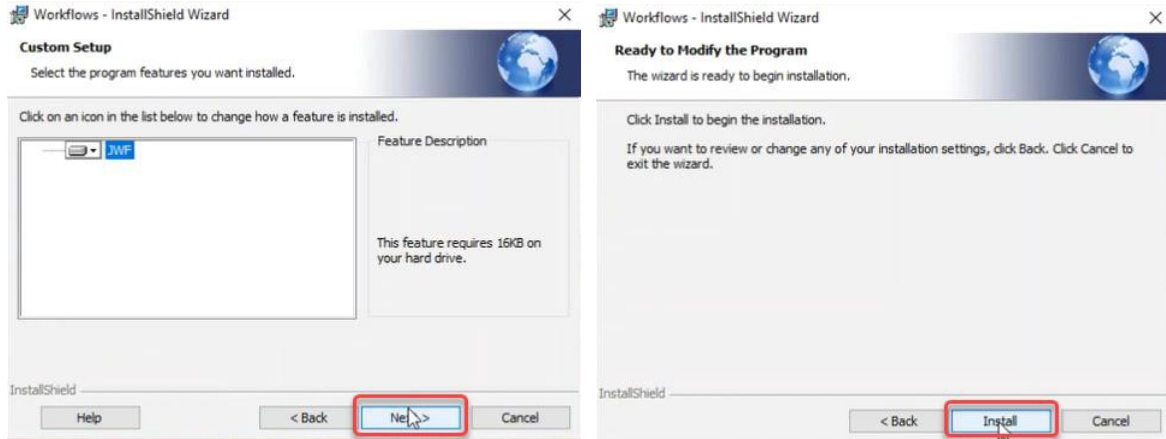
8. Select “Next” when the InstallShield Wizard for WorkFlows is displayed:



9. The InstallShield will recognize that WorkFlows is already installed. The option to Modify should be pre-selected:



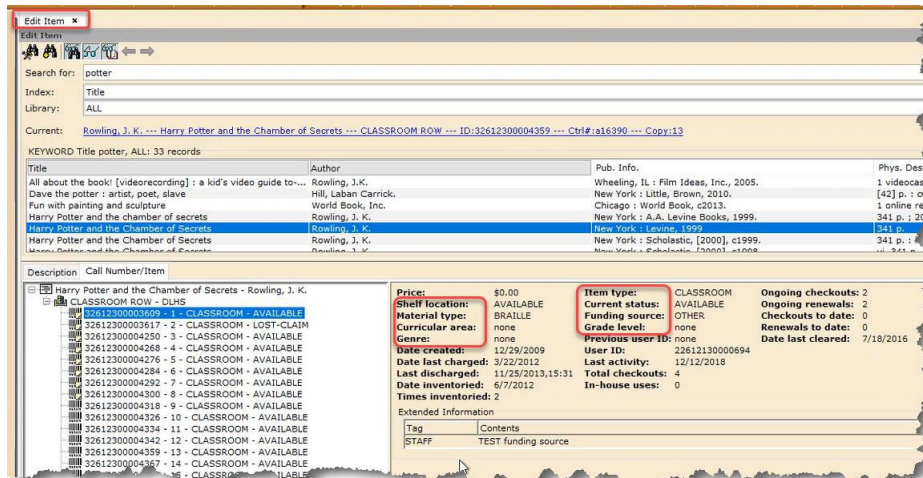
10. When the Custom Setup screen is presented, simply click “Next” and then “Install”:



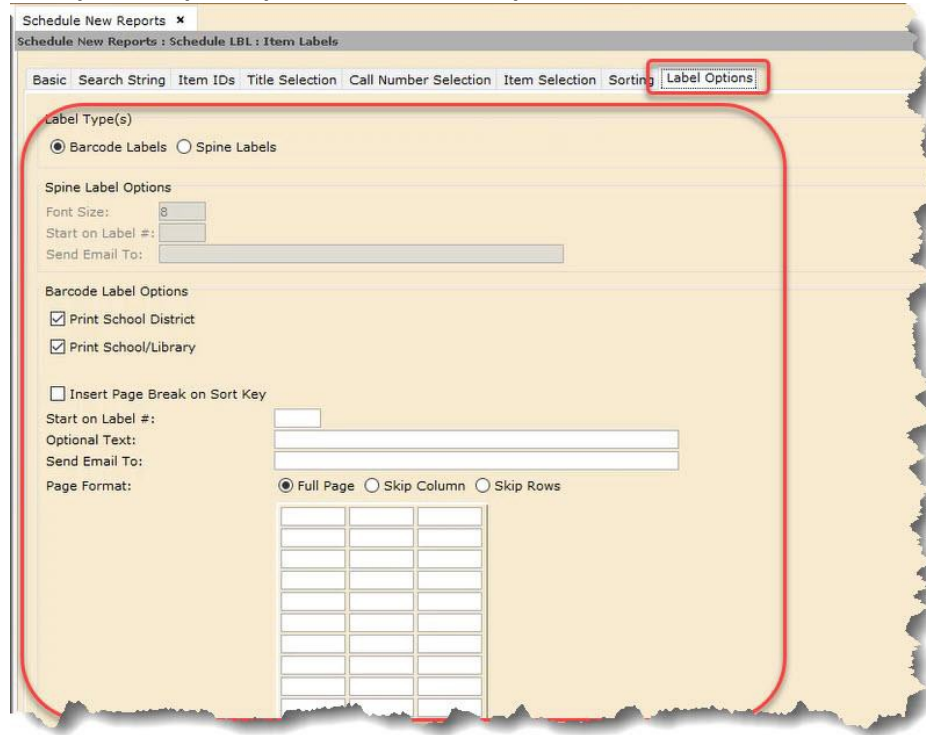
11. Once finished, make certain the library staff can properly log into WorkFlows at least **twice** using their own credentials for the workstation.

12. Make certain that the expected labels are displayed and the report options on INFOhio reports are displayed:

Example of proper labels in Edit Item:

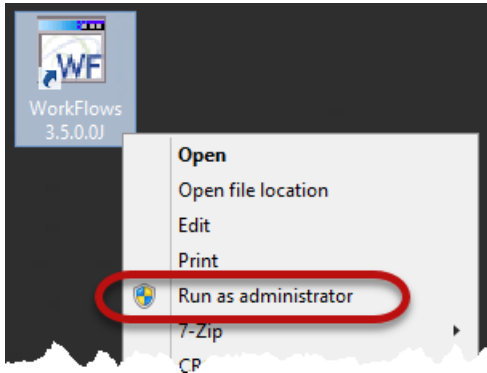


Example of Report Options in INFOhio Report:



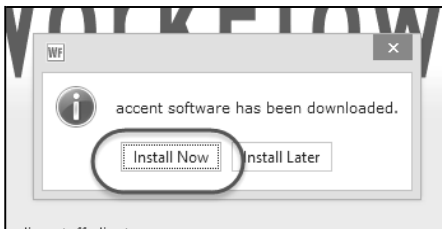
Option 2: On a date determined with the INFOhio Provider and school staff, users with administrative privileges must perform installations under their own account.

1. 'Update staff client?' **Click** the 'Yes' button. If you are NOT prompted to update the client, or if you receive a message to "Contact your administrator, exit out of WorkFlows. Then **Right-click** "WorkFlows" and select the "Run as administrator" option.



If you are still not prompted to update the staff client, contact your school's technology staff.

2. **Click** on "Install Now"



3. Progress screens will display as the files (for program and patches) are being downloaded. The Install Shield wizard will extract files. Continue to **click** "Yes"

Files will be downloaded from the server to your workstation. A progress box displays.

NOTE: You MAY see this message: 'custom' file found – custom.jar will not be overwritten. If you receive this message, simply click 'OK' and continue with the installation.

4. **Click** Finish. Log into Workflows. You will now be using the upgraded WorkFlows Java client.
5. **Click** Help/About from the top menu bar: Confirm that the date/version number matches that provided by your ITC. (If you did not receive this information from your ITC staff, please contact them).

The INFOhio logo should display in the top, right-hand section of the screen.

NOTE: To be able to fully access the INFOhio tab reports, you **WILL** need to logout/login one more time (these will be accessible on the second login and thereafter).




Uninstalling Symphony 3.X.X... 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).
3. Use the utility to **remove** the  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)**.

List of INFOhio Firewall Access

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