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:

WorkFlows Staff Client - 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 Windows 10 Windows 11	Minimum: 800 MHz Suggested: 1 Ghz	Minimum: 4GB Suggested: 8GB	200MB	1024 x 768 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 '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.

Setup

INSTALLATION

- MAC - WorkFlows Installation
- MAC - Barcode Font
- PC - WorkFlows Installation
  - Guide Download Alt Download
- 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.
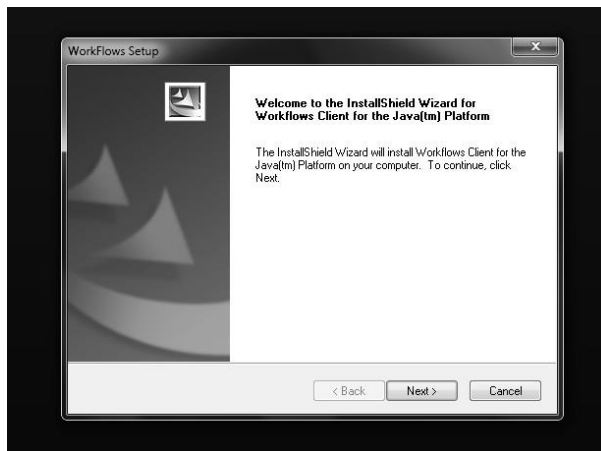
Follow system prompts and accept all defaults.

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".
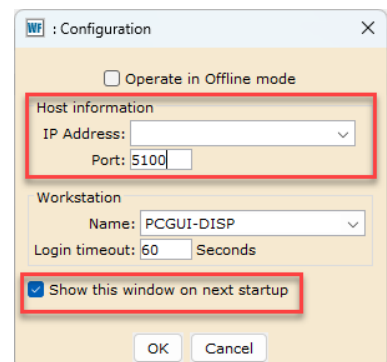
- *Do not* change any other default settings.

- *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: _____
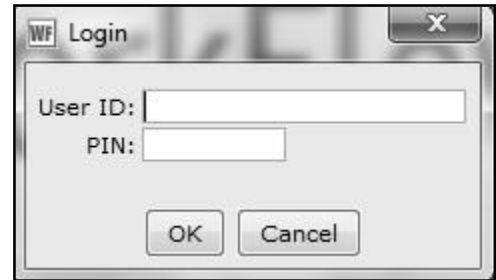
5. <mark>Select</mark> Help/About from the top menu bar. Confirm that the date/version number matches that provided by your ITC.

6. The INFOhio logo should appear at the top right-hand corner of the screen. (If this is not the case, please contact your ITC).

7. From the top taskbar, *select* Preference/Desktop/Desktop setup – verify that "Multiple windows mode" is checked. Select TABBED WINDOWS.

8. 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".
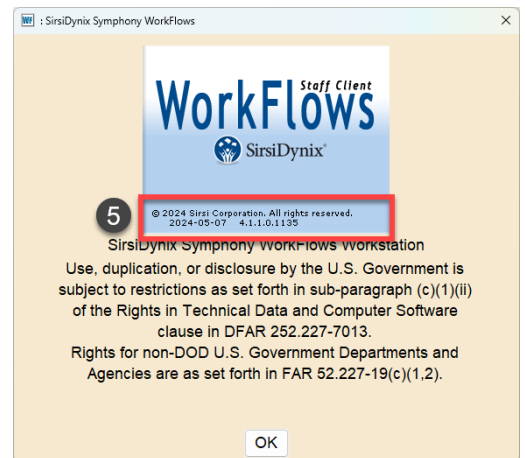
Complete the Process

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.
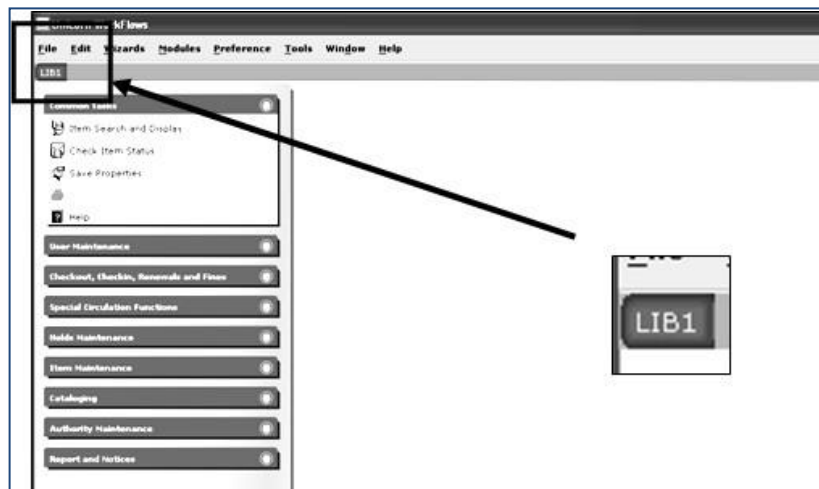
Set Preferences

From the Menu Bar:
1. **Click** Preference
2. Desktop
3. Desktop Setup
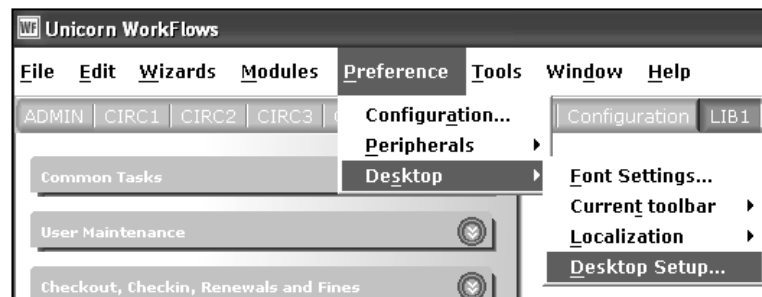
On the Themes drop down menu:

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.
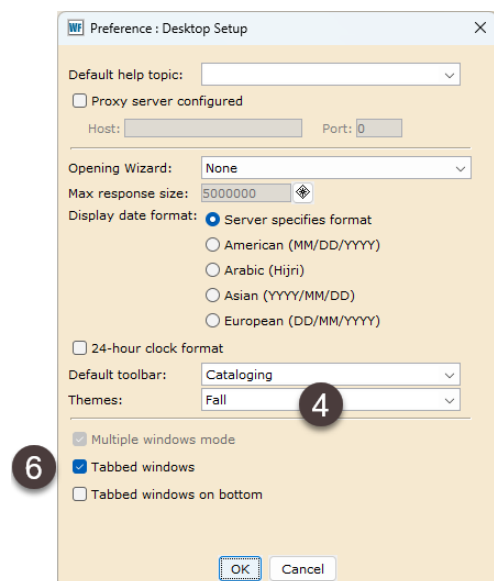
Set the Print Pathway

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."

o Please see the **PC – Setting the Print Pathway** documentation found in the Getting Started section of Setup in the **Library Services 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 <mark>install the appropriate barcode font</mark>. 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 <mark>library staff login in TWICE</mark> 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.

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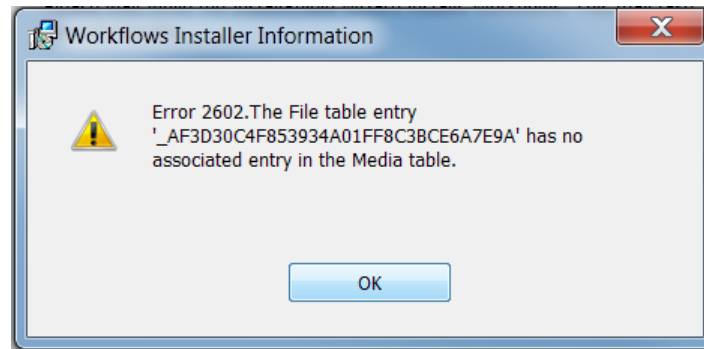
With administrative privileges, right click on the WF icon and select "Run as administrator".

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.
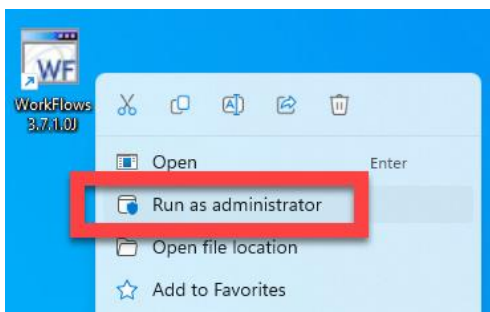
2. You will be prompted to 'update staff client.' Click the YES button:
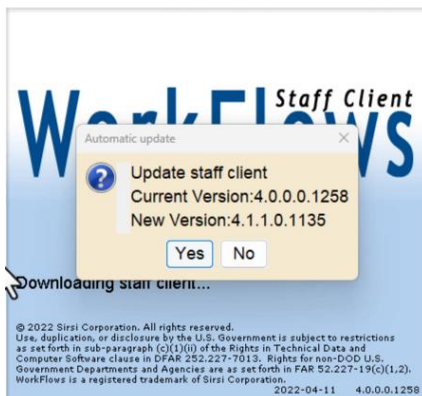
3. You will receive a message that the software will be downloaded for updating. Simply click 'OK'.
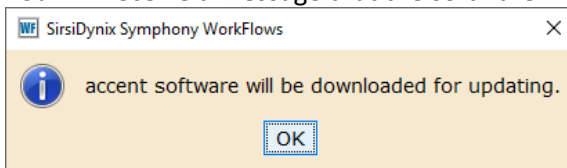
4. Once the download is complete, you will be prompted to 'Install Now'.
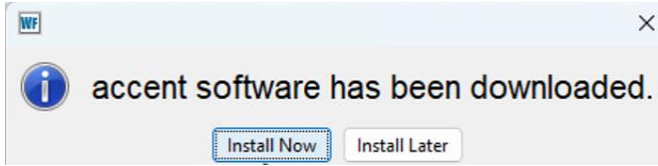
5. Click 'Finish' when the update is complete.
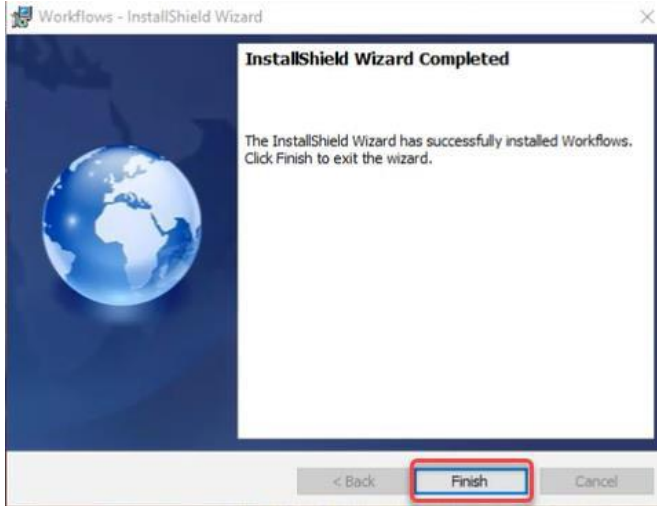
6. Log into WorkFlows with the library staff credentials.

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:

Example of Report Options in INFOhio Report:
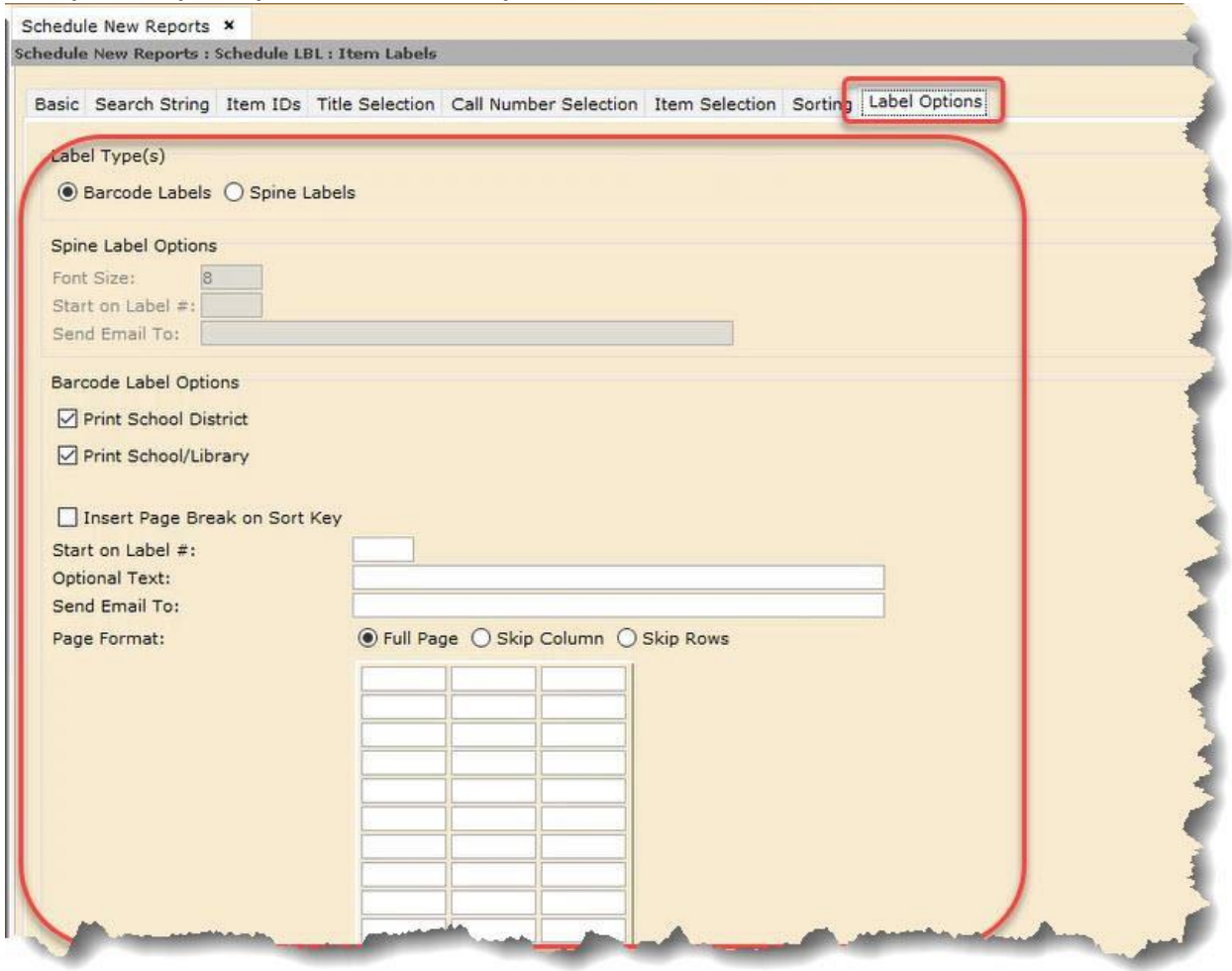
Uninstalling Symphony 4.1.1 WorkFlows Client (PC)

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 [WF] 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