PC WorkFlows Installation (Version 4.2)

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Workstation Requirements

Operating System

- Windows 11 (64-bit)
- Windows 10 (64-bit)
- Windows 8.x (limited support; see notes below)

System Requirements

- **Installer:** MSI version 3.1 or higher
- **RAM:**
  - Windows 11: 4 GB minimum (8 GB recommended)
  - Windows 10 (64-bit): 2 GB minimum (4 GB recommended)
  - Windows 8 (64-bit): 2 GB minimum (4 GB recommended)
  - Windows 8 (32-bit): 1 GB minimum (2 GB recommended)
- **Processor:** 700 MHz minimum (1 GHz recommended)
- **Disk Space:** 200 MB available
- **Display:** 1024 × 768 resolution or higher
- **Network:** TCP/IP support required

Operating System Notes

- Windows 8 and 8.1 are no longer supported by Microsoft (support ended 2016).
- Windows 10 is no longer supported by Microsoft as of October 14, 2025.
- It is recommended to upgrade all workstations to Windows 11.

Setting Permissions

Users must have permission to store files in both the installation directory and their user profile directories.

Required Folder Permissions

Ensure **Read, Write, and Execute** permissions are set for:

- C:\Program Files (x86)\Sirsi (and all subfolders)
- C:\Users\(loginuser)\Sirsi\WorkFlows (and all subfolders)

Test Permissions:

1. Log off the computer and log in as a standard (unprivileged) user.
2. Start WorkFlows and log in.
3. Click the **Reports** group.
4. Click **Report Session.**
5. Check **Notify Owner when report is finished** option.
6. Click **OK.**
7. Close WorkFlows. Click **Yes** to save changes.
8. Restart WorkFlows and log in again.
9. Check to see that the checkbox is still checked. If it is, the permissions are OK.
   a. If the checkbox remains selected, permissions are set correctly.
   b. If not, update folder permissions and repeat the test.

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Installing the Symphony 4.2 WorkFlows Client

INFOhio recommends installing the WorkFlows client under a **library user account** to minimize future administrative requirements.

Recommended Installation Method

Each user with administrative privileges installs the client individually. This allows updates without requiring administrator assistance.

Not Recommended

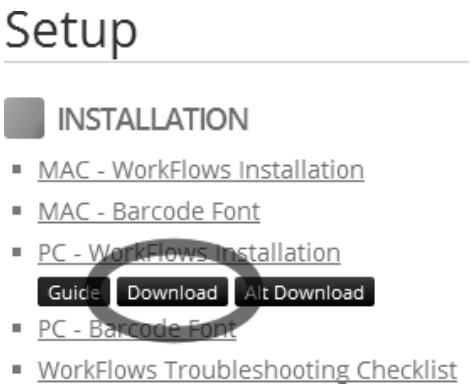
Installing the client once for all users with shared permissions may require ongoing administrator involvement and can lead to reinstallation issues.
Note: This approach may require uninstalling and reinstalling WorkFlows.

Initial Installation Instructions

Use these steps for first-time installations or after uninstalling the client

1. **Backup Your WorkFlows Property File**
   If a previous version exists, back up the property files located at:
   C:\Program Files (x86)\Sirsi\JWF\Property

2. **Download the Symphony WorkFlows Client**
   Download the client from:
   https://www.infohio.org/lsp-handbook/category/handbook-setup
   - Select **PC – WorkFlows Installation**
   - Right-click the download link and choose:
   - **Save Target As** or
   - **Save Link As**
   - Save the file to an easy-to-find location (such as the desktop)
   - If the primary download fails, use the alternate download link.



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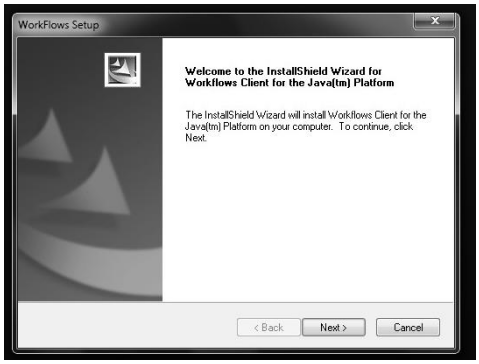
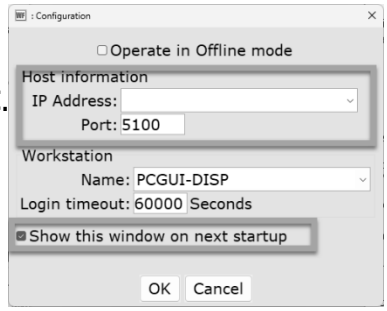
3. **Install the Client**
   - If using a .ZIP file, extract it and run the installer
   - If using a .EXE file, double-click to begin installation
   - Follow all prompts and accept default settings



4. **Configure the Client**



- **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** OK button.
- ***Enter*** your User ID and PIN.
  NOTE: *If login is unknown, contact your ITC.*

Host: _____

Port: _____

User ID: _____

Pin: _____

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5. **Verify Installation**
   - **Select** Help/About.
   - Confirm version: **4.2.0.0.1335.**

6. **Confirm INFOhio Branding**
   - Verify the INFOhio logo appears in the upper-right corner.
     If not, contact your ITC.

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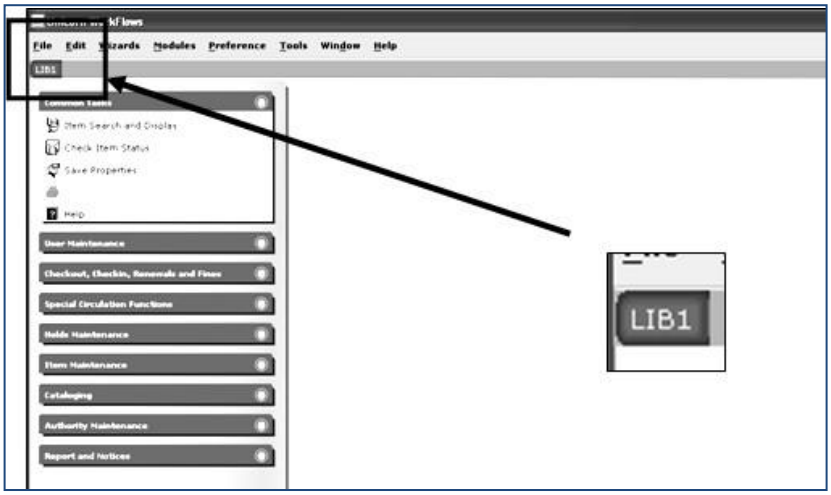
Complete the Setup

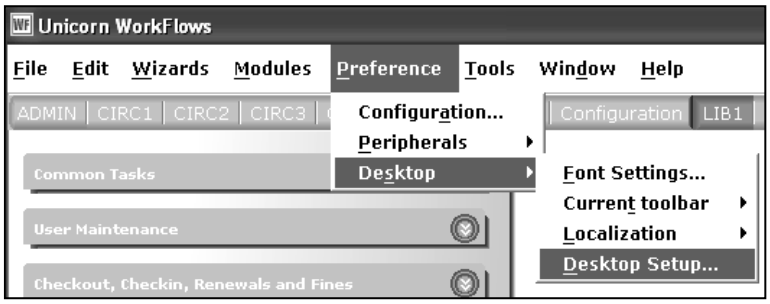
Set Toolbars

Select the toolbar associated with the user login to display appropriate options.



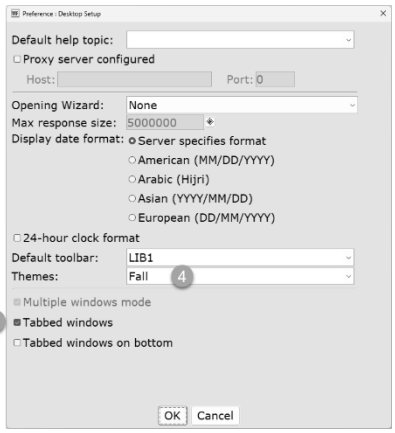
Set Preferences

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



Configure

4. Select a preferred **theme** (do not select Classic)
5. Ensure **Multiple Windows Mode** is enabled
6. Enable **Tabbed Windows Mode**
7. Click **OK**



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Set the Print Pathway

When WorkFlows is first installed, has been reimaged, or the error message "The specified path was not found." displays, the Report Session settings will need to be configured.

Please see the **PC – Setting the Print Pathway** documentation found in the Getting Started section of the **Library Services Handbook** on how to set the print pathway 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 instructions found under the PC – Barcode Font on this webpage: **https://www.infohio.org/lsp-handbook/category/handbook-setup**.

Additional Notes

After installation:

1. Have library staff log in **twice**
2. First login:
    - Display a patron record
    - Confirm images display correctly
    - Set printing preferences
3. Second login:
    - Confirm settings are saved
    - Open a finished report
    - Verify images still display

Optional: Restore Property Files

If issues occur:

1. Restart WorkFlows
2. If problems persist, restore property files from backup
3. Contact your INFOhio ITC if needed

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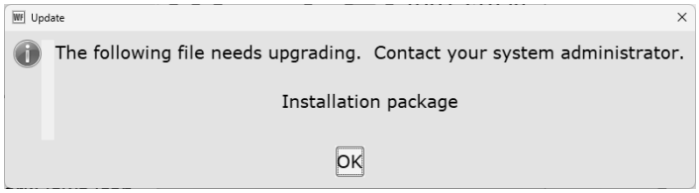
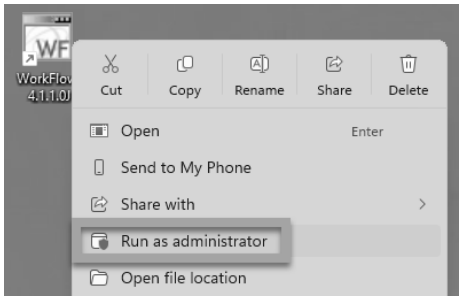
Update an Existing WorkFlows Installation

These steps apply to users with administrative privileges.

When an Update Is Required

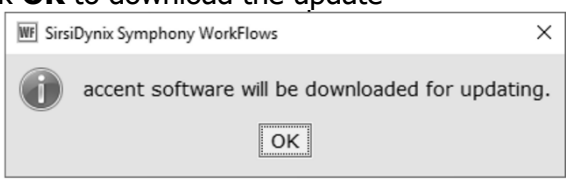
You may see:
"The following file needs upgrading. Contact your system administrator."





1. Right-Click the WorkFlows icon
2. Select **Run as administrator**
3. Make a note of the IP Address and Port number found on the configuration screen.
4. Log in to WorkFlows with your user ID and PIN
5. Click **Yes** when prompted to update staff client

6. Click **OK** to download the update



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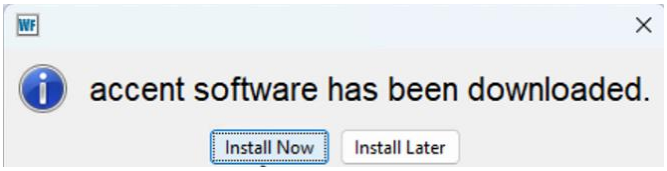
7. Click **Install Now**

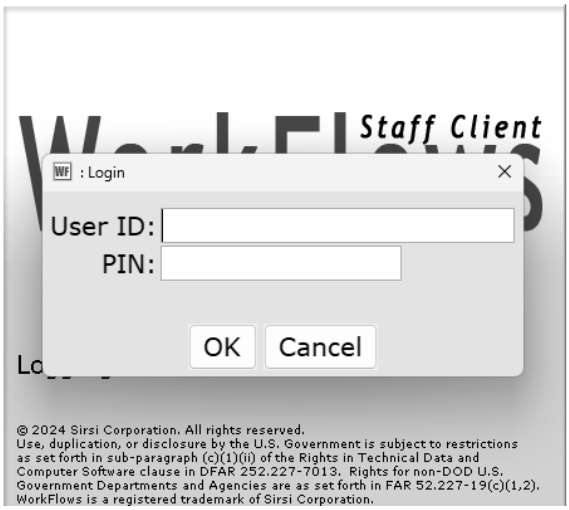


8. Click **Finish** when complete

9. WorkFlows will start automatically, fill in the

   - IP Address
   - Port number

10. Log in twice with library staff credentials



11. Confirm
    a. Labels display correctly

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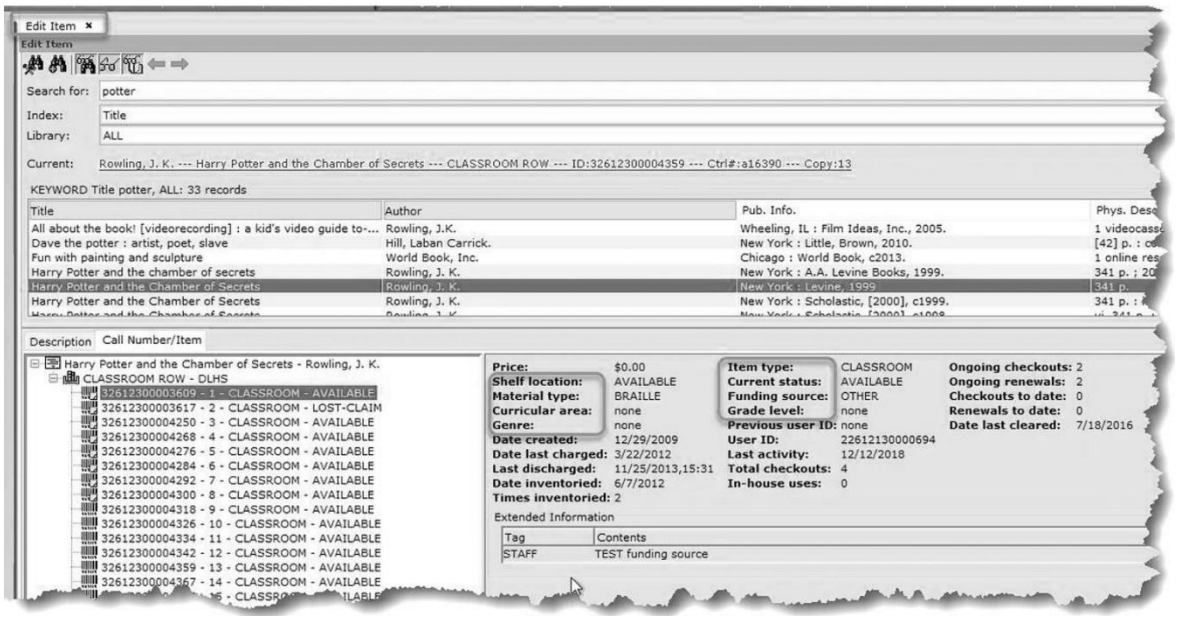
b. Report options are available

Example of proper labels in Edit Item:



Example of Report Options in INFOhio Report:

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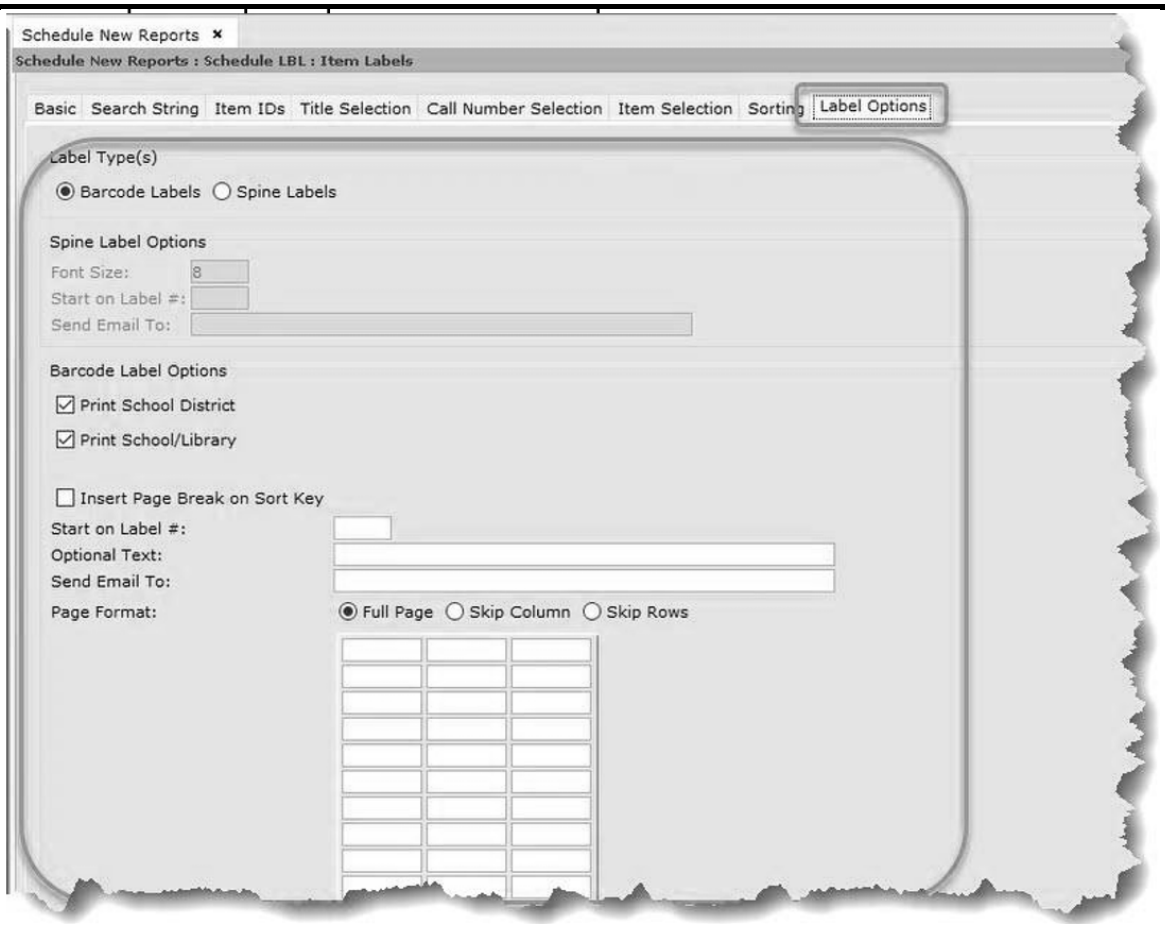

Troubleshooting
If you receive:
"Error 2602"
You must uninstall and reinstall the WorkFlows client.

Uninstalling Symphony 4.2 WorkFlows (PC)

1. Backup Your WorkFlows Property File

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

2. Open Control Panel
3. Under Programs, select Uninstall a program
4. Remove WorkFlows
5. Delete folders
    a. C:\Program Files (x86)\Sirsi
    b. C:\Users\(loginuser)\Sirsi

Additional Resource

List of INFOhio Firewall Access

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

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