

## **Installing Workflows 3.4.1.5 on a Windows 7 or 8 workstation**

**IMPORTANT:** Ensure that “User Access Control” is set to “Never Notify” before installing or re-installing the client. See

[http://msl.mt.gov/Statewide Projects/Montana Shared Catalog/For Members/Help&Guidelines/Disable%20UAC%20on%20Windows%20Vista.pdf](http://msl.mt.gov/Statewide_Protocols/Montana_Shared_Catalog/For_Members/Help&Guidelines/Disable%20UAC%20on%20Windows%20Vista.pdf) for info.

IF A “CLEAN” RE-INSTALL IS REQUIRED:

Uninstall the current version (Workflows 3.4.1.4J for example) and then remove the SIRSI folders in two places before re-installing the client.

1. Go to Control Panel then Programs and Features. Locate and select the current Workflows program and then click “Uninstall” (next to Organize at the top of the control panel window).
2. After uninstall is complete, open Windows Explorer, and select local disk C: then open Program Files (if 64-bit machine, open the x86 programs folder). Locate the “Sirsi” folder, highlight it then right-click and click “Delete”.
3. Return to C: and open the “Users” folder. Open the folder for the Windows user (such as Administrator or Circ or staff name) that was used when the current Workflows client was installed. Locate the “Sirsi” folder, right click and delete it.

Note: The Workflows client runs from the command line and therefore cannot be “Pinned” to the task bar.

Note for Windows 8 or 8.1 users: SirsiDynix has certified Windows 8 with Symphony Workflows. The installation procedures are the same as Windows 7. The client icon can be placed on the Windows 8 touch-screen interface and/or traditional desktop.

Close existing programs (except for your browser) and follow the “New Install” procedures below.

---

### NEW INSTALL

Before beginning the install, contact MSC Admin to receive the user name and password necessary to access the client downloads. Write it down here:

---

To Load Workflows on a staff workstation computer:

1. Go to:

[http://msl.mt.gov/Statewide Projects/Montana Shared Catalog/For Members/default.asp](http://msl.mt.gov/Statewide_Protocols/Montana_Shared_Catalog/For_Members/default.asp) and at the top of the page, click “Download” for the Windows or MAC client. Enter the user name and password when prompted.

2. When asked to Run or Save, select Save and save it to the Desktop location. If not prompted for “save to” location, it will be saved to your default “Downloads” folder. The download may take up to 20 minutes, depending on the speed and bandwidth of your internet connection.

3. When the download is complete, there should be an icon for "fupd\_jwf.exe" on your desktop or in your downloads folder. If in the downloads folder, move or copy it to the desktop. Click it and answer yes to all prompts to begin the installation. When the installation is complete, Workflows will automatically start.
4. When the "Configuration" screen appears, for the IP address; enter mtscprod.msl.mt.gov for the production server. The port may have 5100 already entered, if not, enter it. Don't change any of the other parameters except increase the "Login Timeout" from 60 to 60000. The default Workstation Name on the startup screen may be "Floating Station". This is normal. The name will change to PCGUI-DISP the next time Workflows is started.
5. Log in with your Library's circulation desk or technical staff user and password.

When Workflows opens:

1. Click HELP then Session Info. Check the "Server Version" to make sure it is the latest version: 3.4.1.5 GA. Click Ok then help again and then "About". Check the client version - it should be 3.4.1.5.1098
2. Go to Preference, click peripherals again and click on barcode reader, click barcode reader available. Accept the defaults, click OK
3. Go to Preference again, click desktop> Desktop setup. Leave all defaults although you can change the theme colors if desired (note: do NOT use the "Classic" theme). If desired, tabbed windows and/or multiple windows mode can be checked. Click ok.
4. Go to "Reports" on the "Toolbar" menu near the top. Click on the "Session Settings" wizard at the top of the "Common Tasks" module at the top-left of the screen. Note the "Application to View reports" setting. If the path to the viewing application is incorrect, click on the diamond-shaped "gadget" button directly to the right of the field. This opens a window similar to windows explorer. Navigate to the application (such as Notepad), highlight it and click Ok. Any word processing/editing program can be used to view reports.
5. If your library uses receipt printers: Go to "Preferences" on the top menu bar. Click on Peripherals> Go to Receipt Printer > click on receipt printer available. You can get the printer settings from another work station or go to <http://libraries.montanastatelibrary.org/statewide-projects/montana-shared-catalog/circulation/> and view the Receipt Printer tutorial or script.
5. Close Workflows. **IMPORTANT:** When prompted, select "Yes" to save changed properties.
6. Delete the fupd\_jwf.exe file from the desktop. You may copy the file to a flash drive to use to install on other workstations but make sure the installation file is deleted from the desktop to prevent an accidental re-installation.

Workflows is now installed. To re-start, click on the Workflows 3.4.1.5J icon that is now on your desktop and login with your library's circulation desk or technical/admin staff logins.