

October 26, 2023

Library Staff,

As mentioned earlier in the year, INFOhio is in the process of updating the WorkFlows client software to version 4.0. You will not notice any changes on the user side of the program. The changes being made are related to the server, Symphony 4.0 which WorkFlows is written in. This upgrade will allow for faster and improved processing time, ability for more programing in BLUEcloud and other enhancements on the backside of the program.

All MVECA districts will be upgraded to Symphony 4.0 starting on 11/9 at 3:30pm and continue all day on Friday, 11/10.

USING WORKFLOWS WILL BE AVAILABLE DURING THIS UPDATE TIME, HOWEVER, YOU MUST USE WORKFLOWS IN OFFLINE MODE.

The directions for using WorkFlows in offline mode are below. Once WorkFlows is back up and running (starting 11/11/23) any work you completed in offline mode will sync up with the server copy of WorkFlows.

Users will still be able to use WorkFlows during that time, just in the offline mode. Prior to 11/9 make sure you have the option to select "Operate in Offline Mode".

How to set WorkFlows in Offline mode

When you login to WorkFlows, on the Configuration pop up box check the option "Operate in Offline mode" at the top. Then click OK.

If your Configuration box does not appear when you login, you may have previously unchecked "Show this window on the next startup". Please see steps below to show the configuration box. I recommend doing this now, before 11/9-10/23.

To display/show the configuration box:

1. In WorkFlows, select the "Preferences" menu, then select configuration. (See Figure 1)
2. Check the box "Show this window on the next startup". Then check the box for offline mode when you log into WorkFlows. MAC users DO NOT CHECK SINGLE SIGN-ON box. (Figure 2)

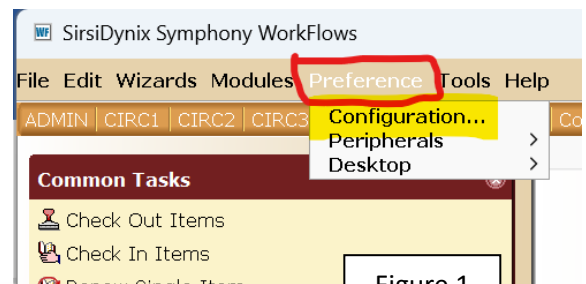
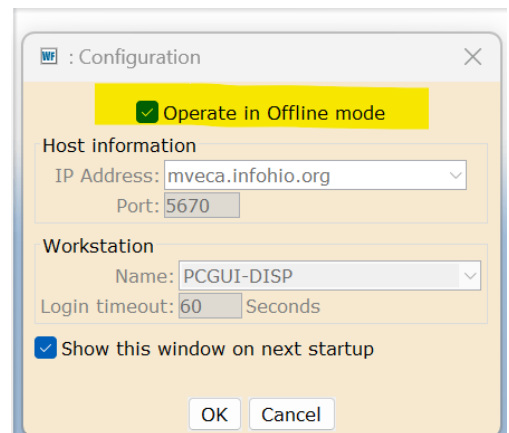
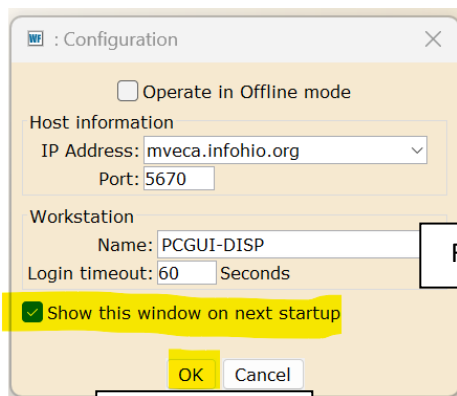
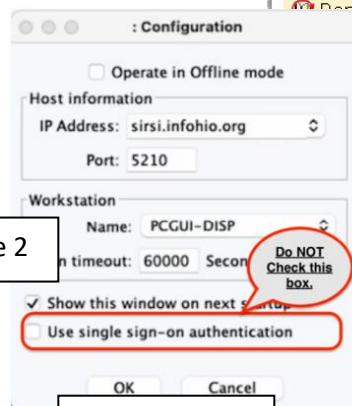


Figure 1



PC Version



MAC Version

Figure 2

Updating existing WorkFlows Installation – AFTER 11/13/23

Starting on Monday, November 13th users will need to upgrade the WorkFlows software to version 4.0. Many library staff members do not have administrator rights to their computer to install/update software, in that case you will need to get your Technology staff involved. I recommend contacting them now to schedule time for this update on 11/13/23 or soon after. The document below will give your Technology staff everything they need to perform the update.

If they have any questions, they can contact me at helplibrary@mveca.org or (937) 767-1468 Ext. 3130.

[Click here to see the update video tutorial](#)

The full guide and WorkFlows Installation can be found on the INFOhio website under Setup.

https://www.infohio.org/images/ZOO_DOCS/wfhandbook/Setup/Install/PCJWFInstallation40.pdf

[Click here to access all the WorkFlows Setup Documentation](#)

[Click Here to access WorkFlows Troubleshooting Checklist](#)

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.

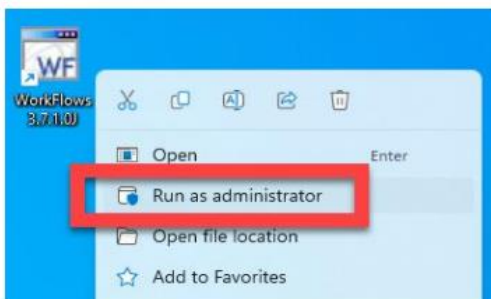
If the client is updated by an administrator, permissions must be set on the files so that all the appropriate users on the machine have the access needed to run the client.

The following permissions must be set:

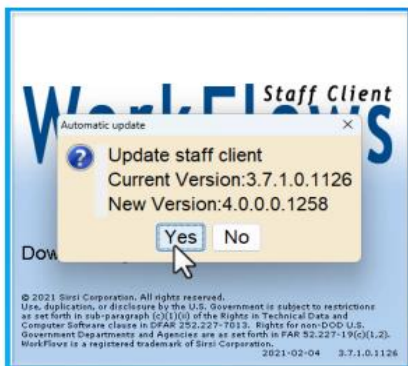
User needs full control access to their own Home directory

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

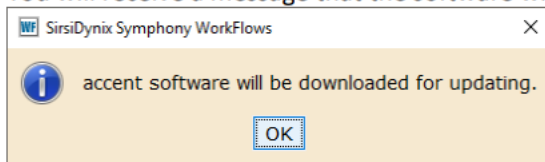
1. **Right-Click** on the WorkFlows icon and select “Run as administrator”. Log into WorkFlows with your normal userID and PIN.



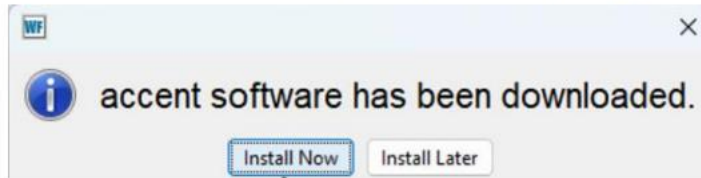
2. You will be prompted to ‘update staff client.’ Click the YES button:



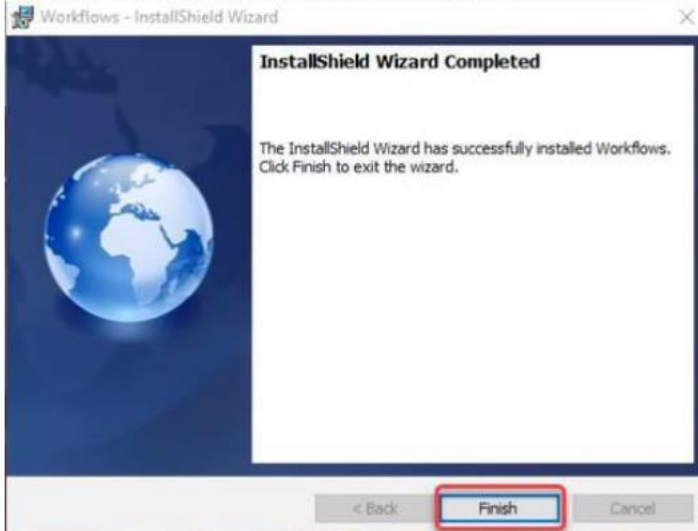
3. You will receive a message that the software will be downloaded for updating. Simply click ‘OK’.



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:

Edit Item

Search for: potter

Index: Title

Library: ALL

Current: Rowling, J. K. --- Harry Potter and the Chamber of Secrets --- CLASSROOM ROW --- ID:32612300004359 --- Ctrl#:a16390 --- Copy:13

KEYWORD Title potter, ALL: 33 records

Title	Author	Pub. Info.	Phys. Desc.
All about the book! [videorecording] : a kid's video guide to...	Rowling, J.K.	Wheeling, IL : Film Ideas, Inc., 2005.	1 videocass.
Dave the potter : artist, poet, slave	Hill, Laban Carrick.	New York : Little, Brown, 2010.	[42] p. : col.
Fun with painting and sculpture	World Book, Inc.	Chicago : World Book, c2013.	1 online res.
Harry Potter and the chamber of secrets	Rowling, J. K.	New York : A.A. Levine Books, 1999.	341 p. : 20
Harry Potter and the Chamber of Secrets	Rowling, J. K.	New York : Levine, 1999	341 p.
Harry Potter and the Chamber of Secrets	Rowling, J. K.	New York : Scholastic, [2000], c1999.	341 p. : 1
Harry Potter and the Chamber of Secrets	Rowling, J. K.	New York : Scholastic, [2000], c1999.	341 p. : 1

Description: Call Number/Item

Harry Potter and the Chamber of Secrets - Rowling, J. K.

CLASSROOM ROW - DLHS

32612300003617 - 2 - CLASSROOM - AVAILABLE

32612300004250 - 3 - CLASSROOM - AVAILABLE

32612300004268 - 4 - CLASSROOM - AVAILABLE

32612300004276 - 5 - CLASSROOM - AVAILABLE

32612300004284 - 6 - CLASSROOM - AVAILABLE

32612300004292 - 7 - CLASSROOM - AVAILABLE

32612300004300 - 8 - CLASSROOM - AVAILABLE

32612300004318 - 9 - CLASSROOM - AVAILABLE

32612300004326 - 10 - CLASSROOM - AVAILABLE

32612300004334 - 11 - CLASSROOM - AVAILABLE

32612300004342 - 12 - CLASSROOM - AVAILABLE

32612300004359 - 13 - CLASSROOM - AVAILABLE

Price: \$0.00

Shelf location: AVAILABLE

Material type: BRaille

Curricular area: none

Genre: none

Date created: 12/29/2009

Date last charged: 3/22/2012

Last discharged: 11/25/2013, 15:31

Date inventoried: 6/7/2012

Times inventoried: 2

Item type: CLASSROOM

Current status: AVAILABLE

Funding source: OTHER

Grade level: none

Previous user ID: 22612130000694

User ID: 22612130000694

Last activity: 12/12/2018

Total checkouts: 4

In-house uses: 0

Ongoing checkouts: 2

Ongoing renewals: 2

Checkouts to date: 0

Renewals to date: 0

Date last cleared: 7/18/2016

Extended Information

Tag	Contents
STAFF	TEST funding source

Example of Report Options in INFOhio Report:

Schedule New Reports

Schedule New Reports : Schedule LBL : Item Labels

Basic Search String Item IDs Title Selection Call Number Selection Item Selection Sorting **Label Options**

Label Type(s)

☒ Barcode Labels ☐ Spine Labels

Spine Label Options

Font Size: 8

Start on Label #: 1

Send Email To: [Text Box]

Barcode Label Options

☒ Print School District

☒ Print School/Library

☐ Insert Page Break on Sort Key

Start on Label #: 1

Optional Text: [Text Box]

Send Email To: [Text Box]

Page Format: ☒ Full Page ☐ Skip Column ☐ Skip Rows

Preview of report output showing a grid of data.

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>

Setup

INSTALLATION

- MAC - WorkFlows Installation
- PC - WorkFlows Installation
- Barcode Font - Free3of9.ttf (MAC & PC)
 - [Guide](#) [Download](#) [Test Document](#)
- WorkFlows Troubleshooting Checklist
- Fix - Spinning Wheel Report Issue
- Firewall Access

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.

For the complete install instructions, click the link below for full documentation:

[Click here to access all the WorkFlows Setup Documentation](#)

[Click here to access the WorkFlows Troubleshooting Checklist](#)