

# Installing Workflows on a Windows 7 workstation

**IMPORTANT:** Ensure that “User Access Control” is set to “Never Notify” before installing or re-installing the client. (Control Panel -> User Accounts -> Change User Account Control settings then move the slide bar down to “Never Notify” then restart the workstation).

## **IF A “CLEAN” RE-INSTALL IS REQUIRED:**

Uninstall the current version (Workflows 3.3.1J 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 32-bit program files). 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) that was used when the current Workflows client was installed. Locate the “Sirsi” folder, right click and delete it. This may or may not be necessary. Contact MSC support.

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

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## **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:

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To Load Workflows on a staff workstation computer:

1. Go to:  
[http://msl.mt.gov/For\\_Librarians/Montana\\_Shared\\_Catalog/Members/default.asp](http://msl.mt.gov/For_Librarians/Montana_Shared_Catalog/Members/default.asp) and at the top of the page, click “Full Install” and enter the user name and password when prompted.
2. When asked to Run or Save, select Save and save it to the Desktop location. The download may take up to 15 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. 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 IP address, enter **mtscprod.msl.mt.gov** for the production server or **mtscdev.msl.mt.gov** for the test/development server. The port should have 5100 already entered, if not, enter it. Don't change any of the other parameters except increase the “Login Timeout” from 60 to 6000.

Log in as your LIBRARYCIRC or TECH user and password.

### **When Workflows opens:**

1. (Note: the receipt printer must be installed in Windows prior to doing the following) 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 MSL > For Librarians> Montana Shared Catalog> Circulation> Set up Receipt Printer. The settings are in both the tutorial and the script.
2. Go to Preference again, 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, 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. Click the red X at the top right of the screen to close Workflows. IMPORTANT: When prompted, select “Yes” to save the properties that were just set. If you are not prompted to save properties, then re-start Workflows (see step 6) and re-do steps 1 thru 4. Delete the fupd\_jwf.exe file from the desktop. You may copy the file to a jump 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.
6. Workflows is now installed. To re-start, click on the Workflows 3.3.1J icon that is now on your desktop and login with your CIRC or TECH logins.