Please Note: Only administrators can install MAC Java Workflows for Symphony 4.1.1.0

Minimum Requirements:

- MAC OSX 10.7 or Later

- 1Ghz Processor (or faster) Recommended

- 2 GB RAM Recommended

- Screen Resolution 1024 x 768 Minimum

- Network Access

**Please note: For best results on a Mac, use a supported version of Microsoft including Office 2021 or 365 for Mac. If you are using an unsupported version of Office, you may need to use LibreOffice and open barcode reports in LibreOffice.

Contents

Step 0: 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 Mac are typically located in the following directory:

~/Library/Preferences directory, where ~ is each user's home directory
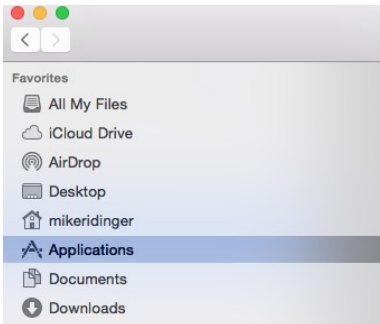
All users who will use the WorkFlows client must be able to write to the ~/Library/Preferences/Workflows folder on their systems.

# Step 1: Checking Permissions

1. Open Finder.


2. Click Applications.

3. Right Click the Workflows application.
4. Select "Get Info"
5. At bottom of window, verify that every user that will be using Workflows (or Everyone) has read/write permission. If not, click the gold lock icon at the bottom-right to unlock the permissions and change the permissions so Everyone has read/write or make sure each user has read/write.
6. Close the "Get Info" window.
7. Right-Click WorkFlows again.
8. Select "Show Package Contents".
9. Right-Click the 'Contents' Folder.
10. Select "Get Info".
11. Verify every user or Everyone has read/write permission. If they do not, click the gold lock icon at the bottom-right to unlock the permissions and then make your changes. Make sure every user has read/write (or Everyone) has read/write permissions.
12. At the bottom of the window, click the down-arrow button next to the Gear icon and select "Apply to Enclosed Items".

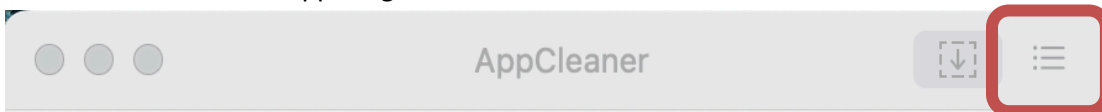# Step 2: Uninstall the existing Workflows Client (if it is currently installed)

13. Download AppCleaner from https://freemacsoft.net/ and install on your computer (This is a FREE App).
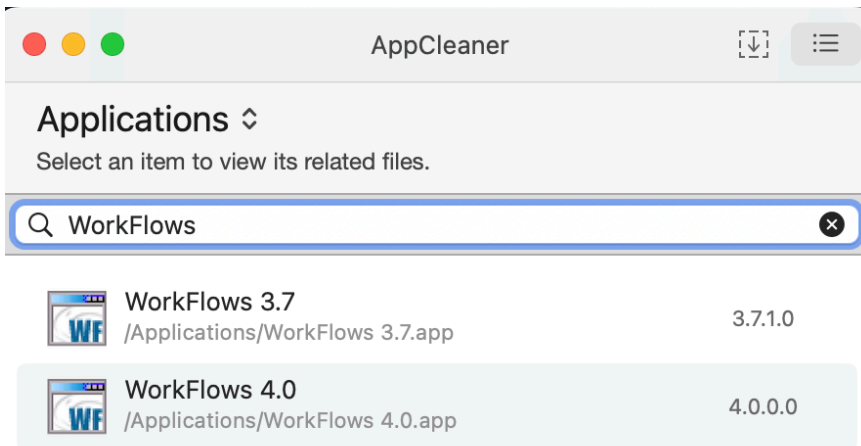14. Double Click on AppCleaner

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AppCleaner
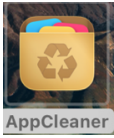
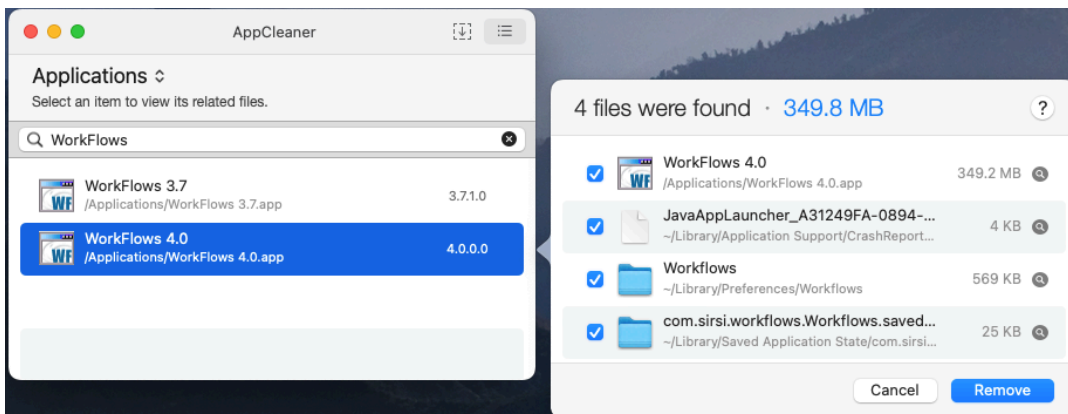15. The following window will appear.
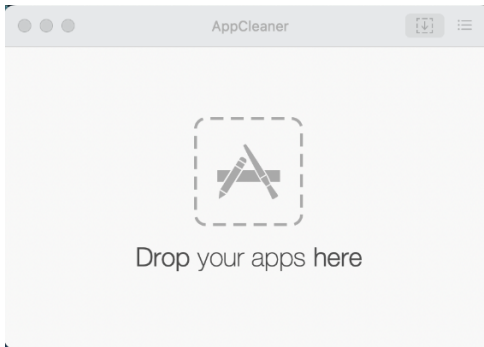
16. Click on the icon in the upper right corner

17. Type in "WorkFlows" in the search bar and click on "WorkFlows"

18. Once you click on the WorkFlows, you will be presented with a list of all the related files that will be removed.

19. Click "Remove". WorkFlows and all the associated files are removed from your computer. This includes WorkFlows preference files.

Step 3: Download the latest MAC Java Workflows Client

20. The latest Workflows download is available at https://infohio.org/library/workflows-handbook/category/installation
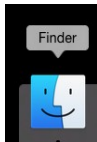

Setup

INSTALLATION

- MAC - WorkFlows Installation
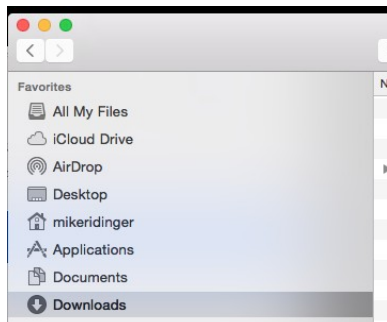 Guide Download Version 4.0 (Select Sites Only)

21. Click the Download button to download the new client.
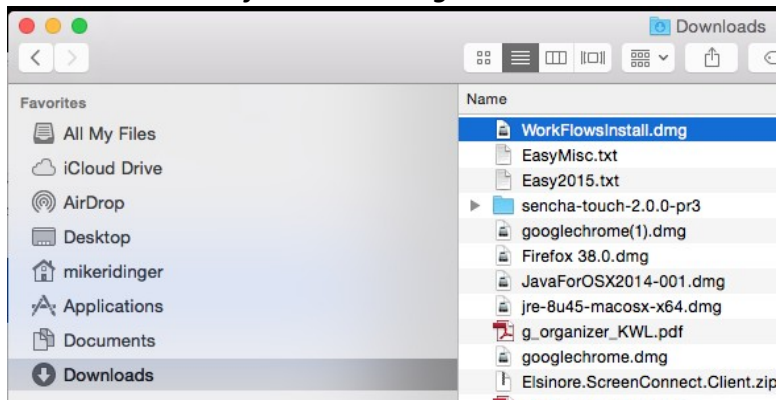
Step 4: Install the new Workflows Client
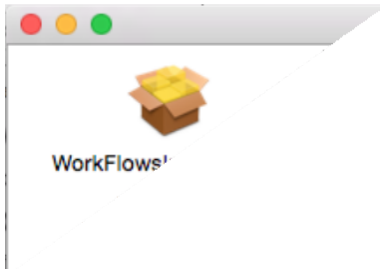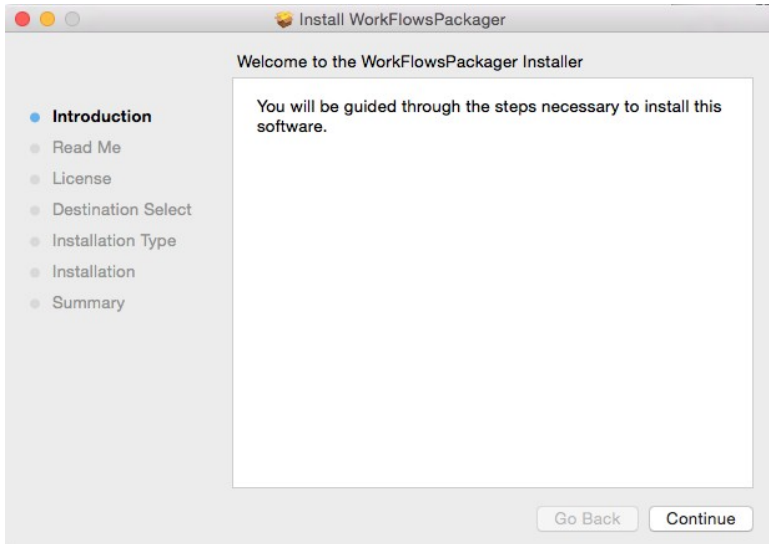
22. Start Finder.

23. Click "Downloads".

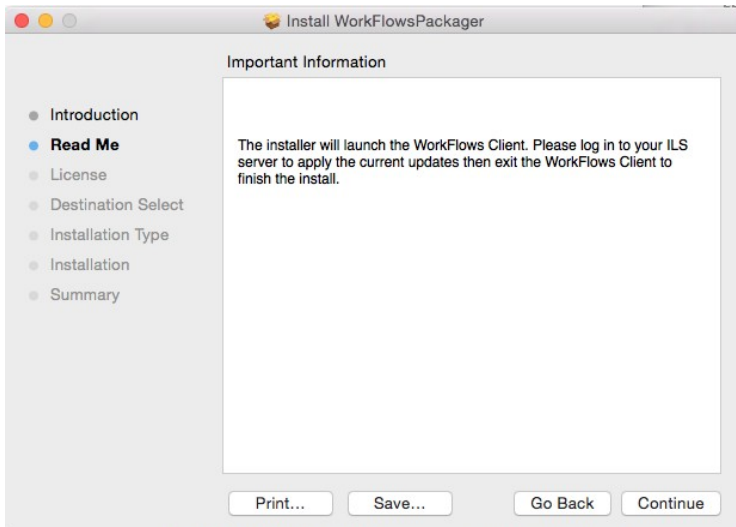24. Locate the file ***WorkflowsInstall.dmg.***

25. Double-click **WorkflowsInstall.dmg** (it will open a window and show you a PKG file).
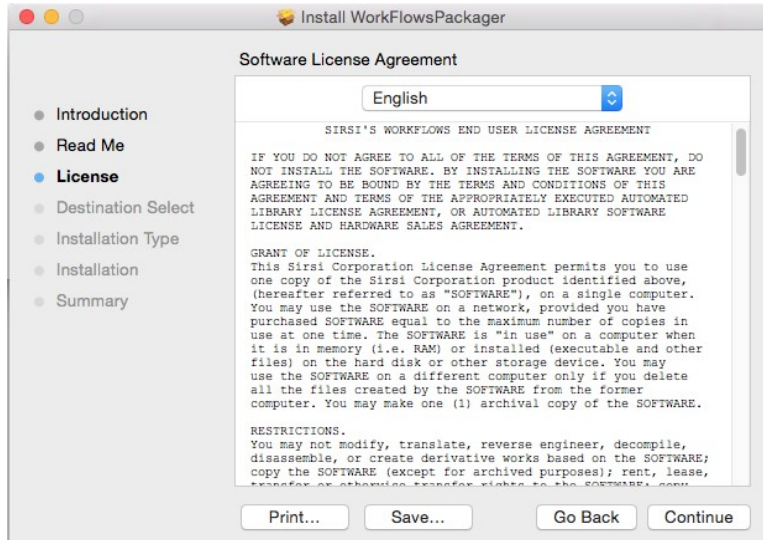

26. Double-click the WorkflowsInstall.mpkg.

27. Click Continue.
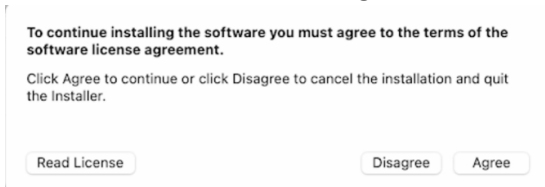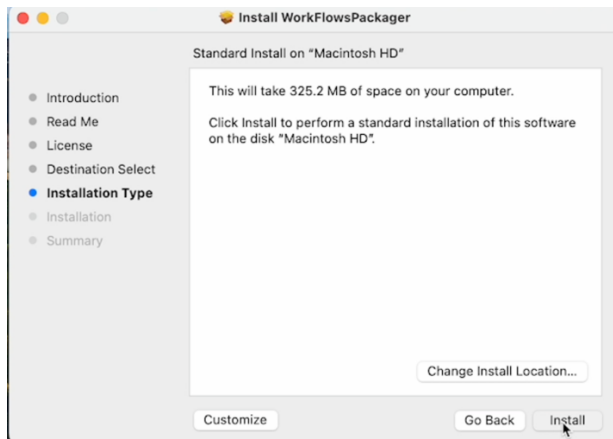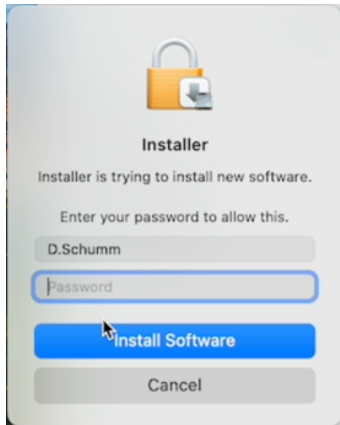
28. Click Continue.

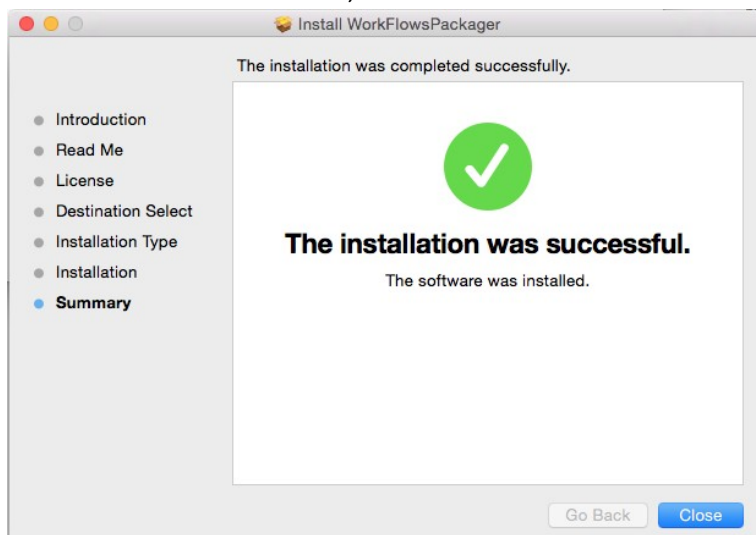29. Click Continue and then Agree.

30. Click Install.

31. Enter your computer login credentials not your WorkFlows credentials for installation of the update. If you don't have local admin privileges, contact your District Technology staff. Click "Install Software".

32. After the installation finishes, click "Close".

33. Close the other windows you have open.

Step 5: Start WorkFlows

34. To open Workflows, go to Applications and double click to open Workflows or use Finder and search for Workflows to open.

35. Please start Workflows and connect to your server and port for Workflows access.

36. **Then log out and log in two more times to finish the process.** You should not see any unusual pop-up messages at all. If you see any pop-up messages, you need to revisit Step 3 or open a SalesForce Ticket or submit a help ticket at https://support.infohio.org/

   a. Select Help/About from the top menu bar. Confirm that the date/version number matches that provided by your ITC.

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.

***Please note that you should not at any time check the second box on the Configuration screen. Checking this will prevent WorkFlows from loading.
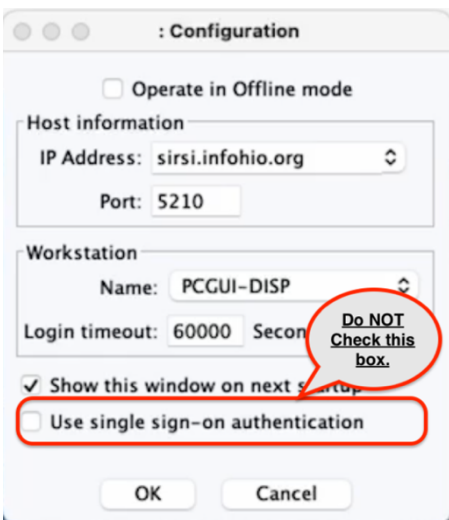
Does your Workflows look like this?
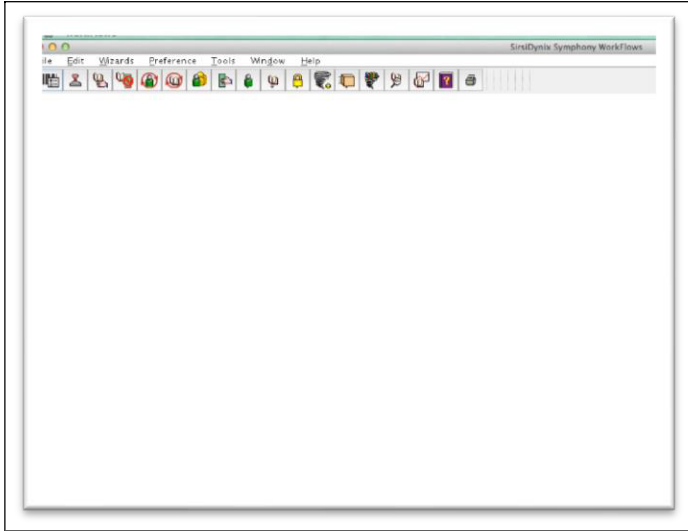
If your screen looks like the image above, do the following.

- Go to the Preference menu
- Choose Desktop
- Choose Desktop Setup
- Under "Themes" change it from "Classic" to "Fall"
- Close the Window

Complete the Process

Setting 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.
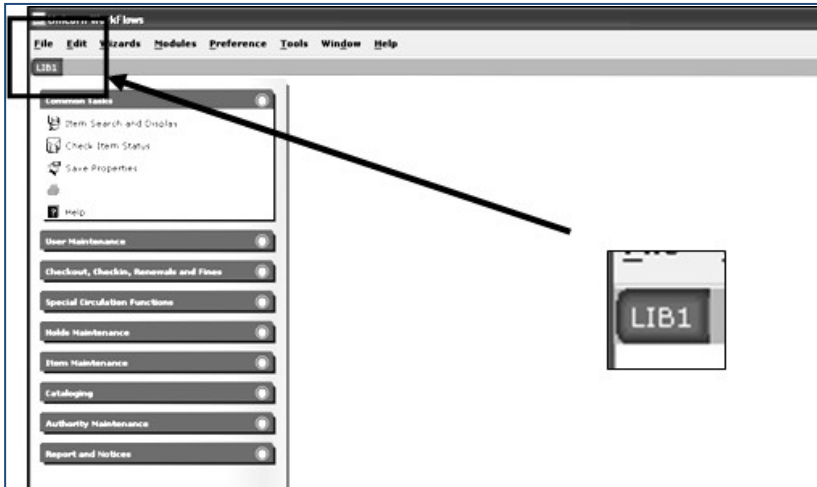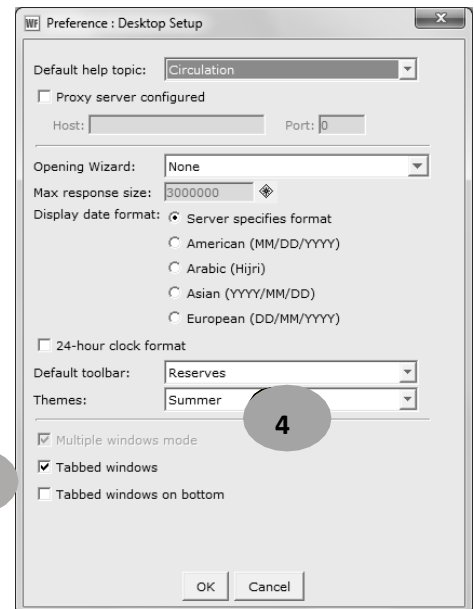

Set Preferences

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 **MAC – 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 install the appropriate barcode font. Beginning the Summer of 2024, you must install the either the Google Barcode Font or the Free3of9 Font to print barcodes. Use the Guide instructions found under ***Barcode Font – Google Barcode Font or Barcode Font – Free3of9.ttf*** on this webpage:

https://www.infohio.org/library/workflows-handbook/category/handbook-setup

Step 6: (Optional) Restore Property Files

As WorkFlows is utilized, 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 and consider restoring your Property files from the backup created at the beginning of the process.

List of INFOhio Firewall Access

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

Update existing WorkFlows Installation

Recently the library software was updated to version 4.1.1. All libraries will need to update their local installation of the WorkFlows software. You can update your software by logging into WorkFlows and following these directions.
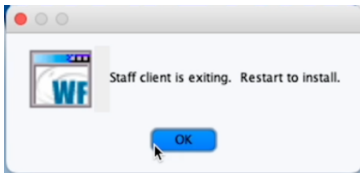
1. After logging into WorkFlows if you get an alert "Automatic update - Update Staff Client." This indicates that you are not on the current version of WorkFlows.
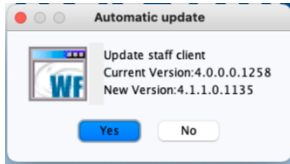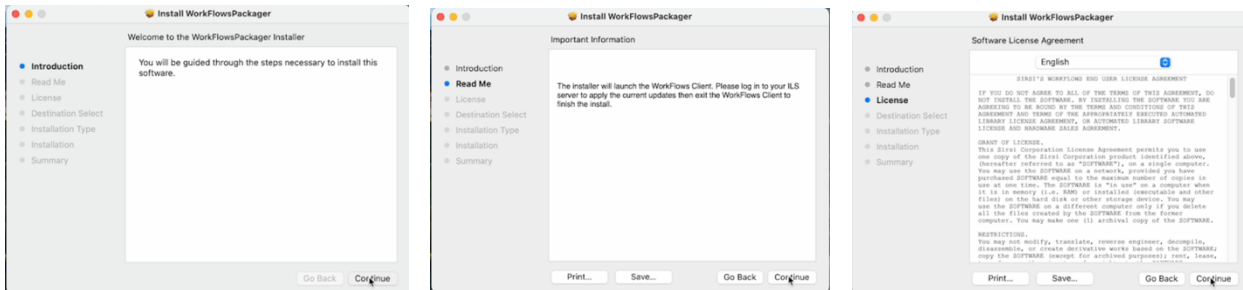

2. Click Yes.

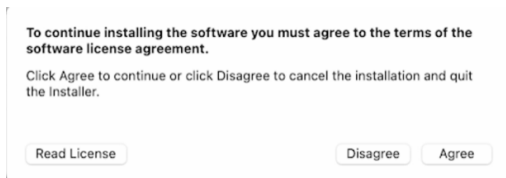3. You will now see a window that shows the status of the update.
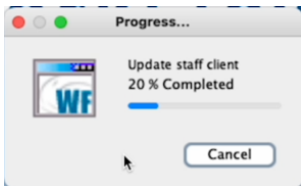
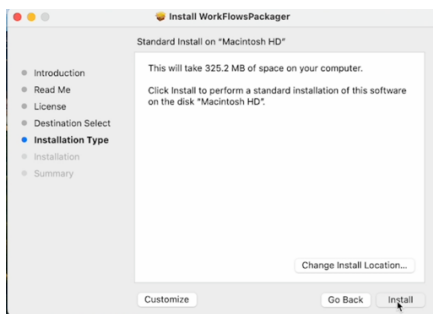4. When the update is complete you will be prompted to "Restart to Install". Click OK.

5. Log into the software.

6. You will be prompted to 'Install WorkFlowsPackager.' Click the Continue button through the three screens.
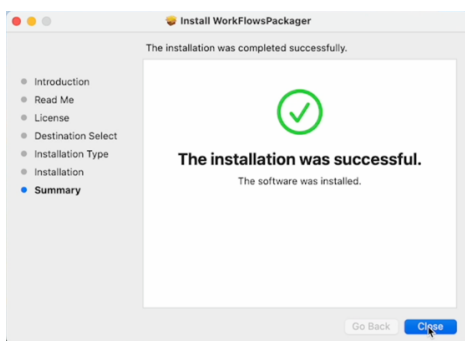
7. Click "Agree".

8. Click the 'Install' button.

9. Enter your computer login credentials for installation of the update. If you don't have privileges, you will need to contact your District Technology staff. Click "Install Software"

10. After the installation finishes, click "Close".

11. Double-click on your WorkFlows Icon.

12. After logging in, at the top click on HELP and select About.

13. Verify that you are using the 4.1.1.0.1135 version of the WorkFlows software.