



Symphony 3.7.1

MAC Workflows Installation Instructions

Revised July 30, 2021

Please Note: Only administrators can install MAC Java Workflows for Symphony 3.7.1

Minimum Requirements:

- **MAC OSX 10.7 or Later**
- **1Ghz Processor (or faster) Recommended**
- **1GB RAM Minimum (2 GB or more Recommended)**
- **Screen Resolution 1024 x 768 Minimum**
- **Network Access**

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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:

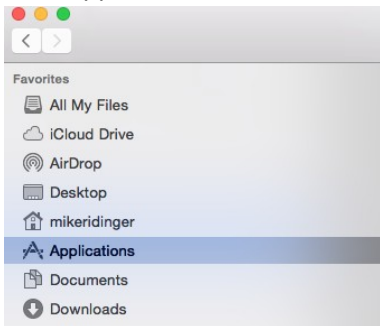
Applications/Workflows.app/Contents/JWF/Property/

Step 1: Checking Permissions

1. Open Finder



2. Click Applications



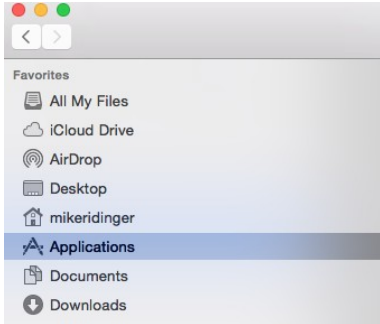
3. Right-Click the Workflows application
4. Select "Get Info"
5. At bottom of window, verify that every user that will be using Workflows (or Everyone) has read/write permission. If not, click the gold lock icon at the bottom-right to unlock the permissions and change the permissions so Everyone has 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'
13. Then close the window

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

14. Start Finder



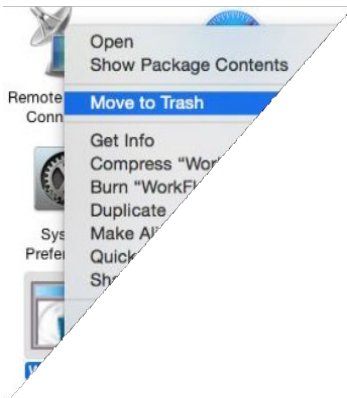
15. Click 'Applications'



16. Locate Workflows in the list of applications. If you cannot find Workflows, then you can proceed to Step 2.

17. Right-click 'Workflows'

18. Choose "Move to Trash"



19. Click the 'Finder' menu at the top left.

20. Search for the following file (s) - WorkFlowsInstall.mpkg and move those to Trash as well.

21. Select 'Empty Trash'

Step 3: Download the latest MAC Java Workflows Client

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

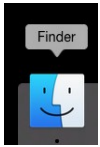
INSTALLATION

- MAC - WorkFlows Installation
Guide Download
- MAC - Barcode Font
- PC - WorkFlows Installation
- PC - Barcode Font
- WorkFlows Troubleshooting Checklist
- Fix - Spinning Wheel Report Issue

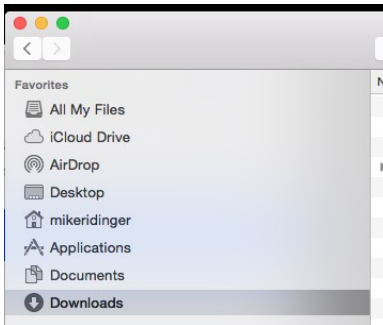
23. Click the Download button to download the new client.

Step 4: Install the new Workflows Client

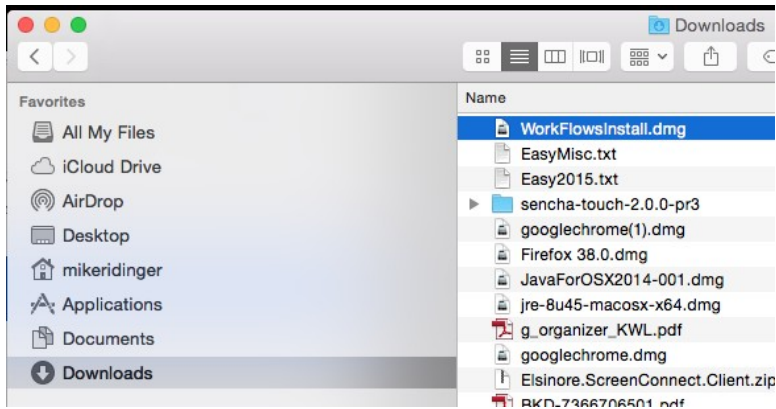
24. Start Finder



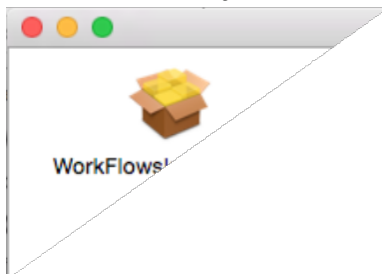
25. Click 'Downloads'



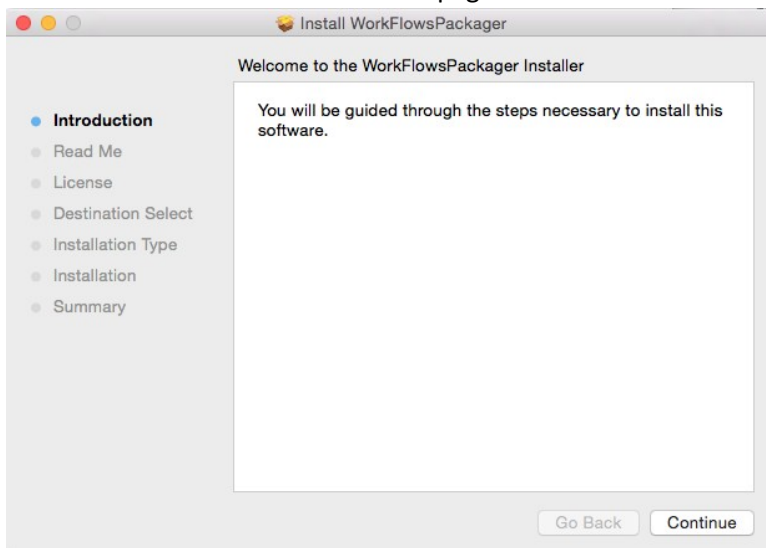
26. Locate the file **WorkflowsInstall.dmg**



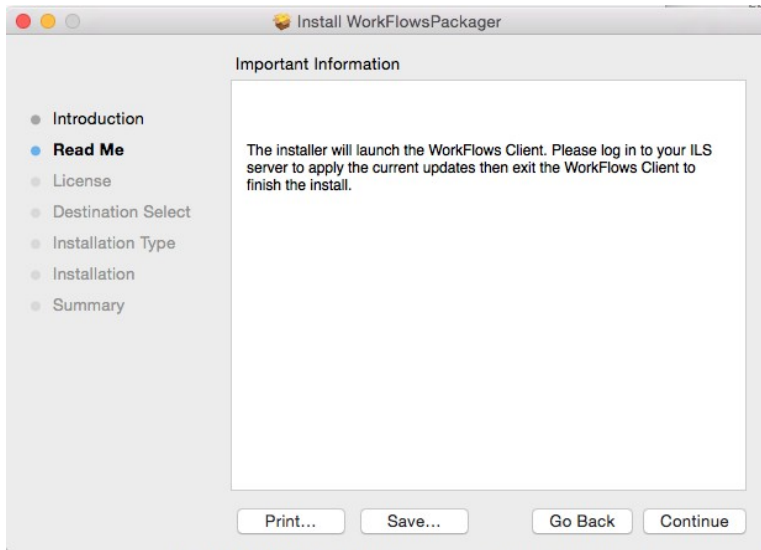
27. Double-click **WorkflowsInstall.dmg** (it will open a window and show you a PKG file)



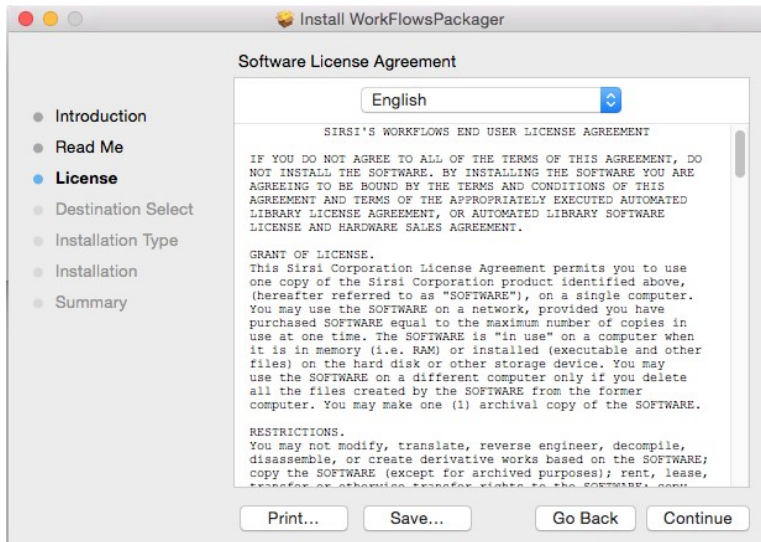
28. Double-click the WorkflowsInstall.mpkg



29. Click Continue



30. Click Continue

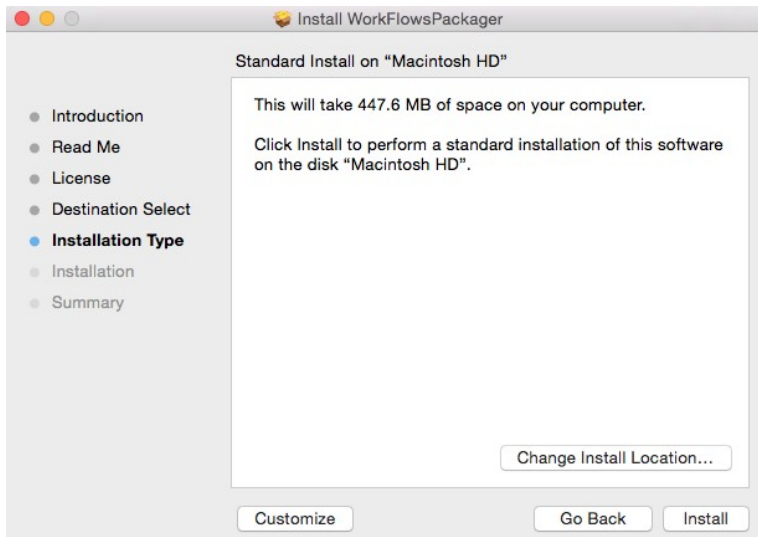


31. Click Continue and then Agree

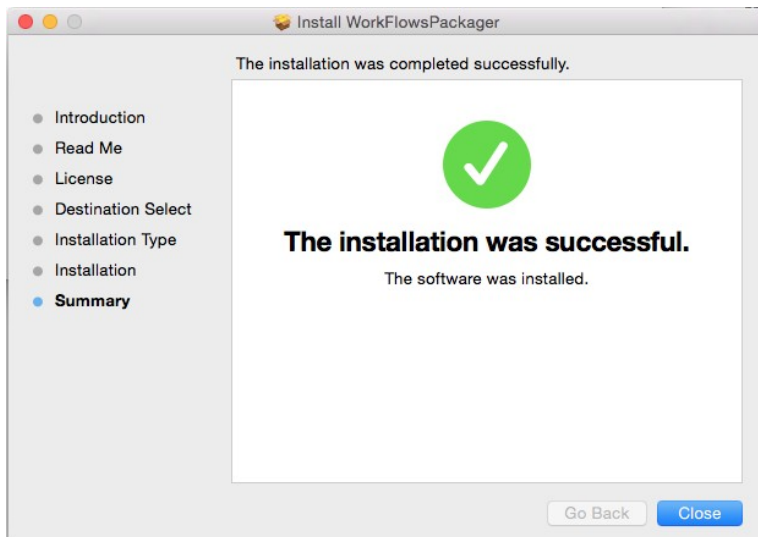
32. Click Macintosh HD and Continue



33. Click Install



34. Click Continue and Finish the Installation



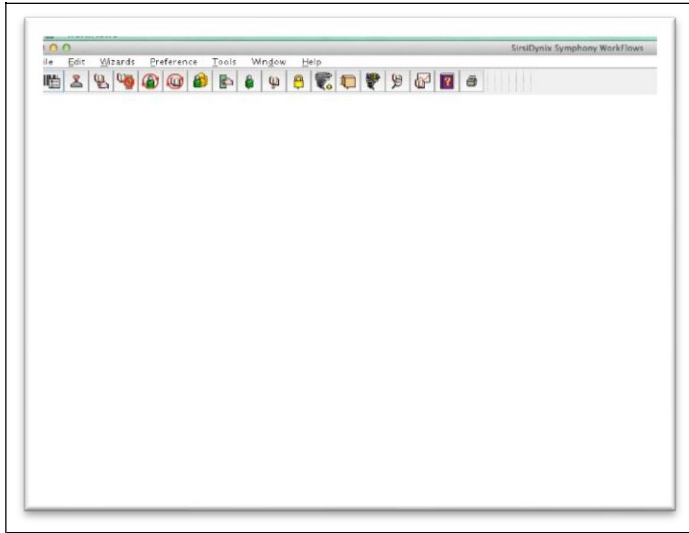
35. Click Close
36. Close the other windows you have open

Step 5: Start WorkFlows

37. To open Workflows, go to Applications and double -click to open Workflows or use Finder and search for Workflows to open.
38. Please start Workflows and connect to your server and port for Workflows access.
39. **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 CherwellTicket.
 - 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 **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.

Does your Workflows look like this?



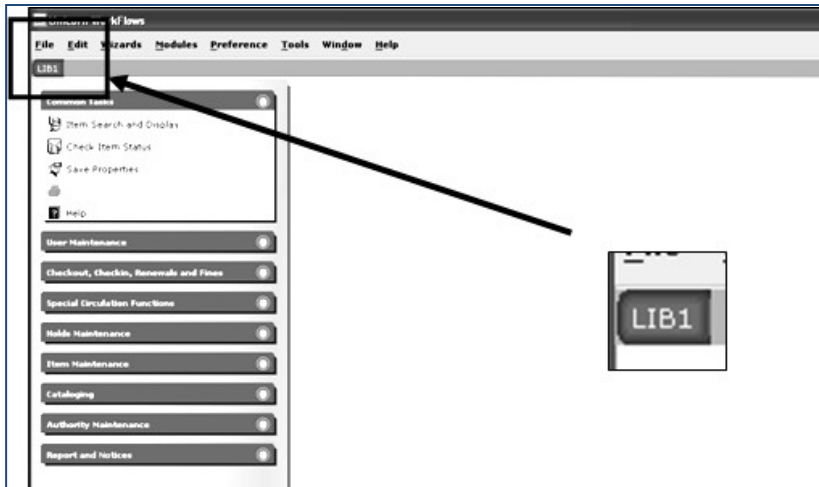
If your screen looks like the image above, do the following.

- 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

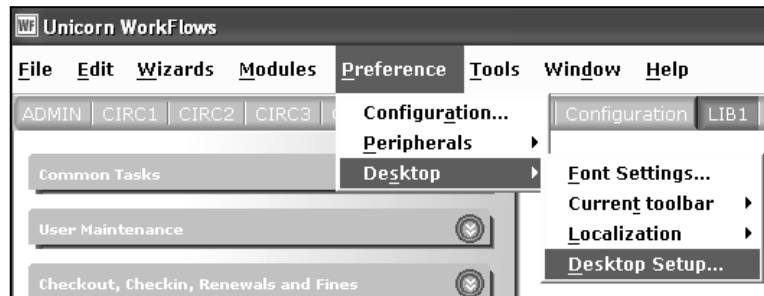
If necessary, **Click** the toolbar name that displays, it will be *the toolbar identified with the user login access*. This will update the menu options.



Set Preferences

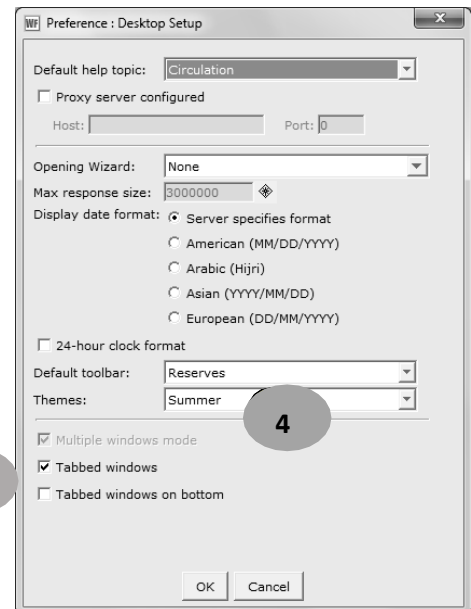
From the Menu Bar:

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."



- Please see the [MAC – Setting the Print Pathway](#) documentation found in the Getting Started section of Setup in the [Workflows 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**. Use the Guide instructions found under **Barcode Font** 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 of your regional ITC 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