

SirsiDynix Symphony 4.1.0

# WorkFlows Client Installation Guide for Macintosh Workstations

November 2023



© 2012-2023 Sirsi Corporation. All rights reserved.

The information contained herein is the proprietary, confidential and/or trade secret of SirsiDynix. All rights not expressly granted in writing are reserved by SirsiDynix. This manual shall not be reproduced, transmitted, stored in a retrieval system, duplicated, used or disclosed in any form or by any means for any purpose or reason, in whole or in part, without the express written consent of SirsiDynix or as except provided by agreement with SirsiDynix. The information in this document is subject to change without notice and should not be construed as a commitment by SirsiDynix.

SirsiDynix grants the right of copying the enclosed material solely for the internal business use of the end user if (1) this document has been legitimately obtained by purchase or by license agreement in conjunction with SirsiDynix products, and (2) this copyright statement is included with each copy. All other copying or distribution is strictly prohibited. Complying with all applicable copyright laws is the responsibility of the user.

SirsiDynix trademarks include but are not limited to BLUEcloud™, BookMyne®, Directors Station®, EOS.web®, eResource Central®, MobileStaff®, SirsiDynix®, SirsiDynix Enterprise®, SirsiDynix Horizon®, SirsiDynix Portfolio™, SirsiDynix Symphony®, Unicorn®, Web Reporter™, and WorkFlows™. Unauthorized use of any SirsiDynix trademark is prohibited.

Other product and company names herein may be the trademarks of their respective owners and SirsiDynix claims no ownership therein. All titles, versions, trademarks, claims of compatibility, etc., of hardware and software products mentioned herein are the sole property and responsibility of the respective vendors. SirsiDynix makes no endorsement of any particular product for any purpose, nor claims responsibility for its operation and accuracy.

SirsiDynix products are developed exclusively at private expense. Use, duplication, or disclosure by the U.S. Government is subject to restrictions as set forth in DFARS 252.227-7013(b)(3) and in FAR 52.227-19(b)(1,2).

11/2023

<b>About this guide</b> .....	<b>iv</b>
Comments and suggestions .....	iv
<b>Preparing for the installation or update</b> .....	<b>1</b>
System and software specifications .....	1
File access and permissions settings .....	2
<b>Installing, upgrading, or removing the WorkFlows client</b> .....	<b>3</b>
Installing the WorkFlows client for the first time .....	3
Updating your existing client .....	4
Removing the WorkFlows client .....	7
<b>Appendix A: For Sites Running MSSQL/Unicode</b> .....	<b>8</b>

# About this guide

This guide explains how to install and update the WorkFlows Version 4.1.0 WorkFlows client on a Macintosh workstation.

## Comments and suggestions

SirsiDynix welcomes and appreciates your comments on its documentation. We want to know what you think about our manuals and how we can make them better. If you have comments about this guide, please send them to [docs@sirsidynix.com](mailto:docs@sirsidynix.com).

Be sure to include the title and version number of the guide and tell how you used it. Then tell us your feelings about its strengths and weaknesses and any recommendations for improvements.

# Preparing for the installation or update

Before you begin to install or update the SirsiDynix Symphony WorkFlows client on a Macintosh, requirements specific to the Macintosh system must be met. See the following topics for information on these requirements:

- [System and software specifications on page 1](#)
- [File access and permissions settings on page 2](#)

## System and software specifications

Refer to the following sections for information on what your Macintosh workstation will need before running the WorkFlows client:

- [Java requirements on page 1](#)
- [Workstation requirements on page 1](#)
- [File access and permissions requirements on page 1](#)

### Java requirements

The SirsiDynix Symphony 4.1.0 server upgrade delivers the required Java JRE 1.8.0\_302 runtime files with the client. These files are located in a JRE folder under the `Workflows.app/Contents/Plugins` folder. To get to this folder, right-click the WorkFlows application and select Show Package Contents.

### Workstation requirements

The following workstation requirements must be met to use the WorkFlows client:

- Running OS X 10.6 or higher and following the recommendations to support multiple, simultaneous applications
- The ability to connect to a SirsiDynix Symphony 4.1.0 server
- 100 MB free hard disk space
- Monitor resolution of 1024 x 768 or better
- TCP/IP networking support
- A processor speed minimum of 700 MHz; 1Ghz is recommended
- A minimum RAM amount of 1 GB; 2 GB is recommended

### File access and permissions requirements

The following file access and permission settings must be configured:

- WorkFlows client users must have full rights (read, write, and execute) and access to the `~/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.

- WorkFlows client users must have full rights and access to the `/Applications` directory. During the installation or update, a file named `workflows.app` is saved to this directory.

## File access and permissions settings

The following file access and permission settings must be configured:

- WorkFlows client users must have full rights (read, write, and execute) and access to the `~/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.
- WorkFlows client users must have full rights and access to the `/Applications` directory. During the installation or update, a file named `WorkFlows.app` is saved to this directory.
- WorkFlows client users must have full rights and access to the `/Library/Receipts` directory. During the installation or update, a file named `WorkFlowsInstall.mpkg` is saved to this directory.

# Installing, upgrading, or removing the WorkFlows client

Once you have met the requirements in the previous section, you are ready to install or update the WorkFlows client. This guide also includes instructions if you want to remove the WorkFlows client from your workstation.

For more information, see the following sections:

- [Installing the WorkFlows client for the first time on page 3](#)
- [Updating your existing client on page 4](#)
- [Removing the WorkFlows client on page 7](#)

## Installing the WorkFlows client for the first time

If you have never used the WorkFlows client on your Macintosh workstation, or if you have never installed the client under a particular login username, perform the following steps.

### To install the WorkFlows client for the first time

- 1 Log in to your Macintosh workstation as a user with administrator permissions.
- 2 Connect to the SirsiDynix Symphony server with the newest installation setup program file (`WorkFlowsInstall.dmg`).
- 3 Download the installation setup program file.
- 4 Double-click the `WorkFlowsInstall.dmg` file. This will create a **WorkFlows Install** icon on the Desktop.

A **WorkFlowsInstall** window opens.

- 5 Double-click the `WorkFlowsInstall.mpkg` file in the **WorkFlows Install** window.

The installer initializes and the following message displays:

```
Welcome to the WorkFlows Installer. You will be guided through the steps necessary to install the software.
```

- 6 Click **Continue** to proceed with the installation.

The following message displays:

```
Important Information. The installer will launch the WorkFlows Client. Please log in to your ILS server to apply
```

the current updates then exit the WorkFlows Client to finish the install.

**7 Click Continue.**

The license agreement displays.

**8 Click Continue.**

The following message displays:

To continue installing the software you must agree to the terms of the software license agreement.

**9 Click Agree** to proceed with the installation.

**10 Accept the default installation destination or choose **Change Install Location** to specify a destination of your choice, then click **Continue**.**

The following message displays:

Click Install to perform a standard installation of this software package on the disk <Your Hard Drive Name>.

**11 Click Install.**

**12 Provide your Macintosh credentials, then choose **Install Software**.**

The install runs. When completed, the following message displays:

The installation was successful. The software was installed.

**13 Click Close** to finish the installation.

The WorkFlows client is now an available application on your Macintosh computer.

**14 Eject the **WorkFlows Installer** image on the desktop and move it to the **Trash**.**



After installing the WorkFlows client for the first time, the default view within WorkFlows will be Classic mode. For information on how to change the WorkFlows theme, see the "WorkFlows Themes" topic of the WorkFlows Online Help.

Each time you start the WorkFlows client after it is installed or updated, the client checks the `stamp` file on the SirsiDynix Symphony server to see if a newer version of the client is available. If a newer version is available, and you are logged in as an administrator, you are prompted to download the new client. If you are not logged in as an administrator, you are only alerted that new files are available. You or another user must log into the workstation as an administrator to download and install the newer version of the WorkFlows client.

## Updating your existing client

If you are currently using the WorkFlows client on your Macintosh workstation, you may update it to the latest client.



Due to modifications to the Java delivery for Macintosh clients, the `mac_install.sh` file from the existing WorkFlows installation needs to be replaced before the client update can take place.



Due to a known issue, upgrading the WorkFlows client from a version older than 3.5.0.1262 does not work; if your WorkFlows clients are of a version older than 3.5.0.1262, a fresh installation is required to install the newest version of the WorkFlows client on the workstation.

For instructions on how to remove the WorkFlows client from the workstation, see [Removing the WorkFlows client on page 7](#). For instructions on how to perform a fresh installation of the WorkFlows client, see [Installing the WorkFlows client for the first time on page 3](#).

### To update an existing WorkFlows client

- 1 Log in to your Macintosh workstation as a user with administrator permissions.
- 2 Open a command prompt.
- 3 At the prompt, type `ftp ftp.sirsiDynix.com` and press **Enter** to log in to the SirsiDynix FTP server.
- 4 At the username prompt, type `symphony` and press **Enter**.
- 5 At the password prompt, type `upgrades` and press **Enter**.  
A successful login message should display followed by an `ftp>` prompt.
- 6 At the prompt, type `cd Tools` and press **Enter** to go to the `Tools` directory.
- 7 Download the `mac_install.sh` file to your workstation.
- 8 Close the command prompt.
- 9 Click **Finder**.
- 10 Click **Applications** and locate WorkFlows in the list of applications.
- 11 Right-click the WorkFlows icon and select **Show package contents** from the right-click menu.  
The `WorkFlows` directory opens.
- 12 Open the `Contents` directory.
- 13 Open the `JWF` directory.
- 14 Replace the existing `mac_install.sh` file with the file you downloaded from the SirsiDynix FTP server.  
**Note:** You may be required to enter an administrator password.
- 15 Open the existing WorkFlows client and log in to the ILS server with your normal username and PIN.  
Once you log in, you will be prompted to update the staff client.
- 16 Click the **Yes** button.

You will see a progress screen as a new WorkFlows client file is downloaded to your workstation.

Once the download is complete, you will see this message:

Staff client is exiting. Restart to install.

- 17 To continue, click the **OK** button.
- 18 Open the WorkFlows client again. This will create a **WorkFlowsInstall** image on the desktop.
- 19 Double-click the **WorkFlowsInstall** icon.

A **WorkFlowsInstall** window opens.

- 20 Double-click the `WorkFlowsInstall.mpkg` file that appears in the **WorkFlowsInstall** window.

The following message displays:

Welcome to the WorkFlows Installer. You will be guided through the steps necessary to install the software.

- 21 Click **Continue** to proceed with the installation.

A new message displays:

Important Information. The installer will launch the WorkFlows Client. Please log in to your ILS server to apply the current updates then exit the WorkFlows Client to finish the install.

- 22 Log in to your ILS and click **Continue**.

The license agreement displays.

- 23 Click **Continue**.

The following message displays:

To continue installing the software you must agree to the terms of the software license agreement.

- 24 Click **Agree** to proceed with the installation.

The Standard Install window displays.

- 25 You can change the installation location by clicking **Change Install Location**. Select the destination where you want to install and click **Continue**.

The following message displays:

Click Install to perform a standard installation of this software package on the disk <Your Hard Drive Name>.

- 26 Click **Install**.

The install runs.

When completed, the following message displays:

The installation was successful. The software was installed.

**27** Click **Close** to finish the update.

The WorkFlows client is now up to date.

**28** Eject the **WorkFlows Installer** image on the desktop and move it to the **Trash**.

Each time you start the WorkFlows client after it is installed or updated, the client checks the `stamp` file on the SirsiDynix Symphony server to see if a newer version of the client is available. If a newer version is available, and you are logged in as an administrator, WorkFlows prompts you to download the new client. If you are not logged in as an administrator, WorkFlows alerts you that new files are available, and you can download the new client if desired. However, you must have administrator privileges to install the new client to the workstation.

## Removing the WorkFlows client

The following instructions are for removing the WorkFlows client from your Macintosh system.

### To remove the WorkFlows client on a Macintosh

- 1** Click and drag the `workflows.app` file from the `\<home>\Applications` folder to the **Trash**.
- 2** Click and drag the `WorkFlowsInstall.mpkg` file from the `\<hard drive>\Receipts` folder to the **Trash**.
- 3** Click and drag the `\Workflows` folder from the `\<home>\library\preferences` folder to the **Trash**.
- 4** Empty the **Trash**.

# Appendix A: For Sites Running MSSQL/Unicode

If your site runs on an MSSQL or Unicode system, review the following requirements for displaying and inserting Unicode characters:

- In order to have a full range of symbols available to you on a Macintosh, you need to use the Lucida Grande font. Lucida Grande supports the most commonly used characters defined in version 2.0 of the Unicode standard, and is delivered with Macintosh OS X.
- To insert symbols into fields in WorkFlows, you must customize fonts to use a Unicode font. On the Preference menu, point to Desktop and click Font Settings. Select Lucida Grande in the Font column of the Font Chooser. If you are in the process of modifying a value when you change fonts, you need to close the record and begin again.

When Lucida Grande has been set up on the Macintosh workstation, it will need to be set up within WorkFlows. Perform the following procedures for configuring Lucida Grande for the WorkFlows client:

## To set the font in Font Settings

- 1 On the WorkFlows menu bar, select **Preference**.
- 2 Select **Desktop**.
- 3 Select **Font Settings**.
- 4 Set Menu text and Window text both to **Lucida Grande**.

## To set the font in the Symbol Table settings

- 1 On the WorkFlows menu bar, select **Tools**.
- 2 Select **Symbol Table**.
- 3 Set Customize font to **Lucida Grande**.

## To set the font for the receipt printer

If the Macintosh workstation has a receipt printer attached, do the following:

- 1 On the WorkFlows menu bar, select **Preference**.
- 2 Select **Peripherals**.
- 3 Select **Receipt Printer**.
- 4 On the Attributes tab, set the font to **Lucida Grande**.
- 5 Click **OK**.