

Mac OS X Installation Guidelines

System Requirements

- Macintosh that came with a G3 or G4 processor
- 1.5GB or more of free hard drive space
- 128MB or RAM; 256MB highly recommended
- Latest firmware updates installed (via OS 9)

Location, Location, Location...

One of the first decisions you will need to make before installing Mac OS X is where you want to place the operating system relative to the hardware configuration of your Macintosh. Keep in mind that a Mac OS X install will typically involve installing Mac OS 9 as well. Do you have an external hard drive that you want to use for one of the Mac operating systems? Do you want to partition a single hard drive and install 9 and X on different partitions? Do you want to install OS X and OS 9 on the same hard drive?

Which one do you choose? Here's the pluses and minuses for your options:

OS X and OS 9 on the same volume

Plus	Minus
Multiple System Folders (Mac OS 9) can be placed on the same volume.	Startup Manager (Dual Boot) is not available at startup.

OS X and OS 9 on different volumes or partitions

Plus	Minus
Startup Manager (Dual Boot) is available at startup.	Only one System Folder per volume or partition.
Easier to install a fresh version of the OS.	
Much easier to troubleshoot.	
Mac OS X and Mac OS 9 folders are not mixed together.	

My recommendation is to partition your internal drive unless you have a dedicated drive you want to use and install Mac OS X and Mac OS 9 on different volumes or partitions.

Should you decide to partition how big do you make the partitions? You must decide how many of your favorite applications require OS 9. Along with that goes what type of applications are they? Graphics applications (PhotoShop) will require more disk space than a grade book program. If you plan on using OS 9 a great deal you might split the drive 50 - 50 otherwise if OS X is your prime application location then you could get by with OS 9 using only 4 or 5GB of disk space.

Installation of OS X & OS 9 - Partitioned Drive

I would recommend starting up the computer with the latest version of Mac OS 9 which accompanies the OS X software. Next follow these steps:

1. Locate Drive Setup in the Utilities folder.
2. Launch Drive Setup and partition the drive into the sizes you prefer. NOTE: make sure and select HFS Extended format.
3. Quit Drive Setup and name each partition.
4. Launch Mac OS 9 system installer and follow the directions.
5. After OS 9 is installed restart the Macintosh.
6. After the restart make sure you have the necessary configurations established to connect to the Internet and next launch Apple Software Update.
7. Update your Macintosh with the suggested updates particularly any Firmware updates. This update process usually requires a restart.
8. Install any OS 9 applications and peripheral drivers that you intend to use.
9. Insert the Mac OS X system install CD and launch the installer and follow the steps. TIP: Make sure and use the Mac OS X Setup Assistant after the installation and follow the directions.

When you restart your Macintosh after installing OS X you will then boot from then on into Mac OS X even though OS 9 is installed. I will discuss the options for dual booting and also selecting which OS in the section System Startup - Switching Between 9 & X.

Installation of OS X & OS 9 - Different Volumes

The procedure is somewhat easier on two different volumes because your biggest decision is to decide which volume you want to use. I would most likely use the larger drive for OS X since at some point this will become your sole operating system.

If you already have Mac OS 9 installed on an internal hard drive and you are adding OS X to an external drive make sure you are using the latest version of Mac OS 9 and follow steps 6 & 7 above to make sure you also have the latest OS 9 updates. You might even consider initializing the drive and starting from a fresh OS 9 install.

Make sure the hard drive of choice has been initialized with HFS Extended format before installing OS X. Installing OS X on a separate volume just requires you inserting the CD and launching the installer. Make sure you select the right target hard drive for installation. Follow the OS X installer and use the Mac OS X Setup Assistant for completion.

System Startup - Switching Between 9 & X

After Mac OS X has been installed it will be the default OS at system startup. If you would prefer to boot into Mac OS 9 (this is not the same as launching Classic) you have the following options depending on how you installed the two operating systems:

Mac OS X and Mac OS 9 on the same volume

1. Mac OS X use System Preferences --> Startup Disk
2. Click the appropriate Mac OS 9 System Folder, then click Restart. (See Fig. 1)



Fig. 1

1. Mac OS 9 use Control Panels --> Startup Disk
2. Click on the Mac OS X System Folder, then click Restart. (See Fig. 2)

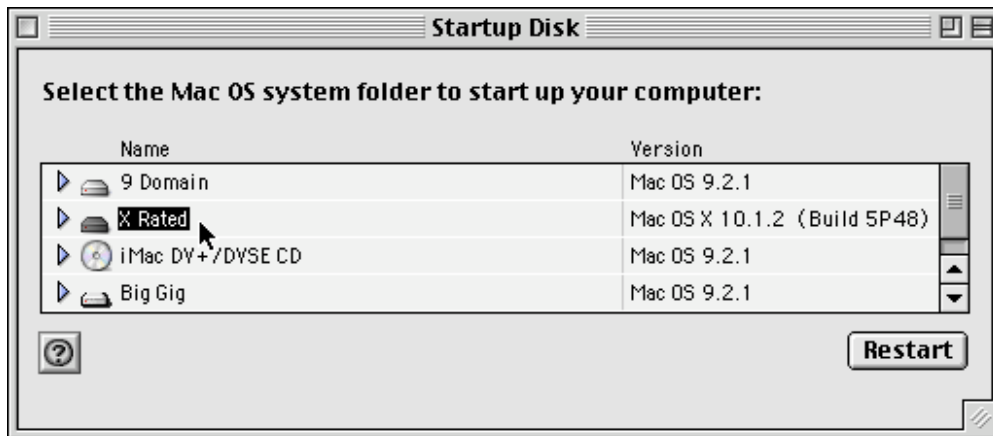


Fig. 2

Mac OS X and Mac OS 9 on different volumes or partitions

1. Same as described above
2. Dual Boot - at startup hold down the *OPTION* key, select the volume or partition that contains the System folder you wish to use, click the *CONTINUE* button.

Classic Mode - Using Mac OS 9 on Mac OS X

Apple has allowed you to continue to use many of your Mac OS 9 applications without having to restart your Macintosh using Mac OS 9. This is referred to as the Classic within Mac OS X. To initiate the Classic mode you can do the following:

1. Double-click the Mac OS 9 application or file and Classic will launch automatically. (Fig. 4 and Fig. 5)
2. Mac OS X System Preferences --> Classic, select the Classic OS 9 System Folder, click Start. (Fig. 3)

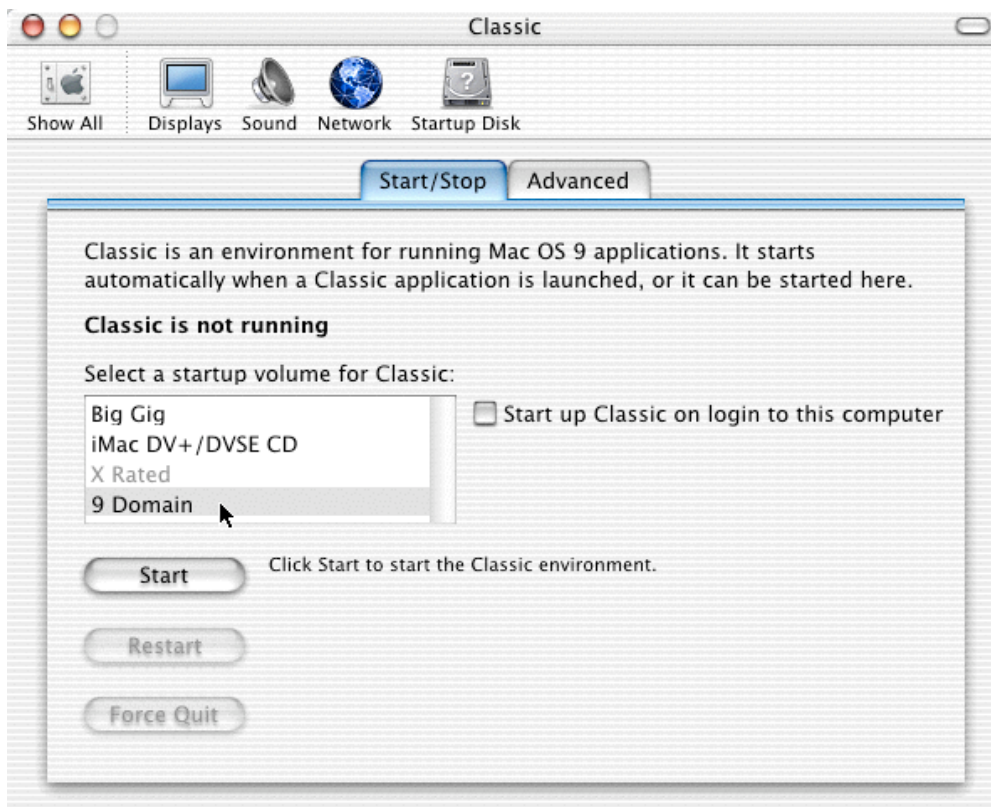


Fig. 3

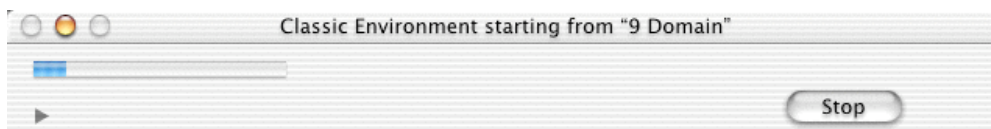


Fig. 4



Fig. 5

If you tend to use the Classic environment a great deal you may want to have Classic launch at the startup of OS X. Do the following:

- Mac OS X System Preferences --> Classic, click the check box “Start up Classic on login to this computer”.

Things to Remember Regarding Classic

- The Classic mode is simulating Mac OS 9 within OS X, which is not the same as actually launching into Mac OS 9 at system start up.
- Performance of OS 9 applications may vary.
- You lose the preemptive multitasking, multithreading, and protected memory features of OS X within the OS 9 applications (not within Classic itself).
- Many peripherals may not function.

Quitting Classic

Since the Classic mode is actually running under OS X and uses few resources when it is running in the background, it is advisable to leave Classic running. In fact when Classic is running it does not even place an icon on the Dock.

There may be instances however when you do want to exit Classic manually:

- Mac OS X System Preferences --> Classic, click Stop or Restart.
- If the Classic application is frozen or has crashed you select Apple Menu --> Force Quit, in the list that appears select Classic, and click Force Quit. (Fig. 6)

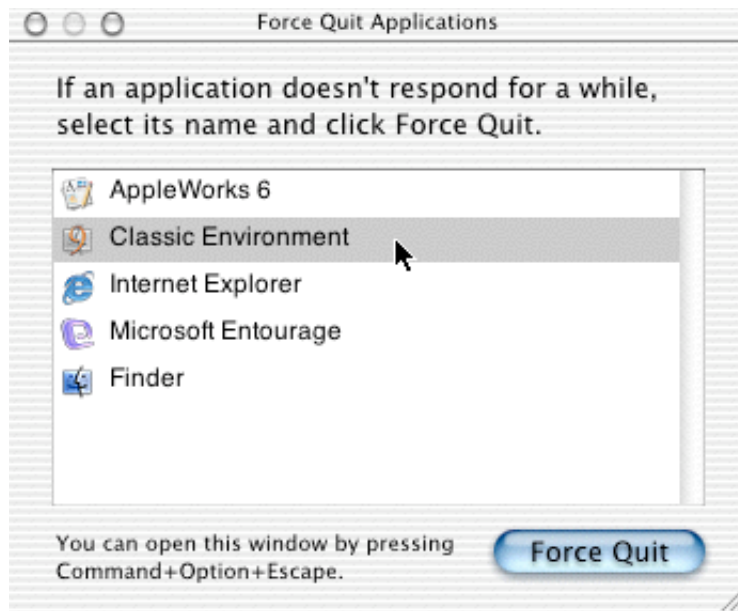


Fig. 6