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Xerox® FreeFlow® Core
Installation Guide: Windows 7 SP1

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Prerequisites

Supported Operating Systems

- Windows 8.1 Update (64-bit)
- Windows 7 SP1 (64-bit) – Recommended for production environments with light workloads.

  Note

  MSHotfix for Windows 7 SP1 required

  http://support.microsoft.com/default.aspx?scid=kb;en-US;2545227

- Windows Server 2008 R2 SP1

  Note

  MSHotfix for Windows Server 2008 R2 SP1 required

  http://support.microsoft.com/default.aspx?scid=kb;en-US;2545227

- Windows Server 2012
- Windows Server 2012 R2
- Windows Server 2012 R2 Update - Recommended for most production environments.

Note

FreeFlow Core does not support installation on computer systems that utilize Federal Information Processing Standards (FIPS). For more information on Federal Information Processing standards and guidelines, refer to the National Institute of Technology and Standards (NITS) web site at: http://www.nist.gov/itl/fipsinfo.cfm

Note

FreeFlow Core server should be configured with a static IP address. DHCP is not recommended.

Note

Additional installation guides may be obtained from the Drivers & Downloads section in the FreeFlow Core page: http://xerox.com/automate.

Note

Foundation, Core, Home, and Starter editions of all Microsoft Operating Systems are not supported.

Required Third Party Software

- Microsoft .NET Framework 3.5 SP1 (required for SQL Server Management Studio)
- Microsoft .NET Framework 4.5
- Internet Information Services (IIS) 7.5 or higher
- Microsoft SQL Server 2012 Express SP1/SP2 with Tools or Standard or Microsoft SQL Server 2014 Express with Tools or Standard
    - Requires the SQL Server version which includes Management Studios
    - Microsoft SQL Server must be installed in the FreeFlow Core server. Only local databases are supported.
- Supported version of Internet Explorer or Firefox browser
- Silverlight 5.1.30317.0 or higher (if required, downloads and installs automatically when opening the FreeFlow Core UI)

Optional Third Party Software

- Required for Microsoft Office Conversion
    - Microsoft Office 2013 (64-bit)
- Required to open and view PDF files
    - Adobe Reader XI

Supported Web Browsers

- Internet Explorer 10 or higher via compatibility mode on Windows 7 (64-bit), Windows 8.1 Update (64-bit), Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2 and Windows Server 2012 R2 Update

- Firefox 27 or higher on Windows 7 (64-bit), Windows 8.1 Update (64-bit), Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2 and Windows Server 2012 R2 Update
- Firefox 27 or higher on Mac OS X 10.7 or later
- Safari 6.1.4 or higher on Mac OS X 10.7 or later

Prerequisites

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Installing the Prerequisites

Prior to installing FreeFlow Core, a full windows update should be performed.

.Net Framework 3.5 SP1

If required, enable or download and install .Net Framework 3.5 SP1. For both automatic and manual installations, you need to manually configure the .Net Framework 3.5 SP1.

For Windows 7 or Windows Server 2008 R2:
http://windows.microsoft.com/en-us/windows/turn-windows-features-on-off#1TC=windows-7

For Windows 8.1: http://technet.microsoft.com/en-us/library/dn482064.aspx

For Windows Server 2012 R2: http://technet.microsoft.com/en-us/library/dn482071.aspx

Automatic Installation

Note
Prior to using the preinstaller, if you are planning to automatically install the Microsoft SQL Server 2014 Express, please ensure you are installing on an Operating System which matches the language of the preinstaller. If the Operating System language does not match the Microsoft SQL Server 2014 Express language, Microsoft SQL Server 2014 Express will not install.

To automatically configure the .net Framework 4.5, Server Roles and Features, Internet Information Services (IIS settings), Windows Hotfixes, and Microsoft SQL Server 2014 Express with Tools with the preinstaller:
1. Double-click **FreeFlowCore-4.0.x.x-PreInstall_yy.exe**.

   yy represents the language code.

Dutch preinstaller not available. Localized Dutch SQL Express is not available.

2. In the FreeFlow Core 4.0 Prerequisites Tool window, select **Next**.

3. In the Database Settings window:

   a) If a SQL database is not detected:

      i. Ensure **Check this box to install SQL Express 2014** is selected.

      ii. Enter and confirm the password for the SQL System Administrator Account.

      Note

      The System Administrator account password is required again during FreeFlow Core installation.

      iii. Enter the **Database Instance ID**. The default is **SQLExpress**.

      iv. Select **Next** to continue.

   b) If a SQL database is detected, you can either:

      i. Skip creating a new database instance by unchecking this option and pressing **Next**.

      - OR -

      ii. Create a new database instance:

      1. Select **Check this box to install a new database instance**.

      2. Enter the SQL System Administrator password.

      3. Enter a name for the new **Database Instance ID**.

      4. Click **Next** to continue.

4. Click **Finish** when the pre-installation completes.

   If the pre-installation completes with an error message, please review the identified logs and make corrections manually as required.

Manual Installation

.Net Framework 4.5.x

If required, enable or download and install .Net Framework 4.5.x from http://www.microsoft.com/en-us/download/details.aspx?id=30653.

Internet Information Services 7.5 on Windows 7 SP1

1. Select **Control Panel > Programs > Programs and Features > Turn Windows Features on and off**.
2. Under Internet Information Services, select the following items:

- Web Management Tools
    - IIS 6 Management Compatibility
        - IIS Metabase and IIS 6 configuration compatibility
    - IIS Management Console

- World Wide Web Services
    - Application Development Features
        - .NET Extensibility
        - ASP.NET
        - ISAPI Extensions
        - ISAPI Filters
    - Common HTTP Features
        - Default Document
        - Directory Browsing
        - HTTP Errors
        - HTTP Redirection*
        - Static Content
    - Health and Diagnostics
        - HTTP Logging
        - Logging Tools*
        - Tracing*
        - Request Monitor
    - Performance Features
        - Static Content Compression
    - Security
        - Basic Authentication
        - Request Filtering
        - Windows Authentication

3. Under Microsoft Message Queue (MSMQ) Server, select the following:

- Microsoft Message Queue (MSMQ) Server Core*
  - MSMQ Active Directory Domain Services Integration*
  - MSMQ HTTP Support*

4. Select **OK** to apply the settings.

Note

Items denoted with asterisks (*) are newly required for FreeFlow Core 4.0.

Microsoft SQL Server 2012 Express or SQL Server 2012 Standard Edition (SP1/SP2)

Install Microsoft SQL Server 2012 Express with Tools

Note

The instructions for other versions may vary.

1. Download Microsoft SQL Server 2012 SP1/SP2 Express with Tools (SQLEXPRWT_x64_xxx.exe). The software can be downloaded from the Microsoft SQL Server Express site:
http://www.microsoft.com/en-us/download/details.aspx?id=35579.

xxx represents language code.

2. Install SQL Server 2012 SP1 Express with Tools.
   a) Launch the SQLEXPRWT_x64_xxx.exe.
   b) Click **Run** to allow the program to install.
   c) On SQL Server Installation Center Dialog, select **New SQL Server stand-alone or add features to an existing installation**.
   d) On the License Terms, accept the terms. Click **Next**.
   e) On Product Updates, click **Next**. Updates will automatically download and install.
   f) On Feature Selection, click **Next**.
   g) On Instance Configuration, select **Named Instance**. Click **Next**.

   You may optionally change the instance ID. The Instance ID is required during the Xerox® FreeFlow® Core installation.

   h) On Server Configuration, modify the SQL Server Browser Startup Type to Automatic. Click **Next**.
   i) On Database Engine Configuration, for Authentication Mode, select **Mixed Mode**. Enter a password for the "sa" account. Click **Next**.

   The "sa" account password is required during FreeFlow Core installation.

   j) On Error Reporting, click **Next**.
   k) Once the installation is complete, close the dialog.
   l) Close the SQL Server Installation Center.

Install SQL Server 2012 Standard Edition

1. Install SQL Server following instructions provided by Microsoft using the following options.
2. On SQL Server Installation Center dialog, select **New SQL Server stand-alone installation or add features to an existing installation**.
3. Select the **Include Product updates** check box.
4. In the Feature Selection dialog, select the following options, the same as SQL EXPRESS:
   a) SQL Server Replication
   b) SQL Client Connectivity SDK
   c) Management Tools - Complete
5. On Instance Configuration, select **Named Instance** and specify a named instance, for example, FREEFLOWCORE.

   Do not use MSSQLSERVER as the instance ID. The FreeFlow Core installation will fail to configure the database if this is the instance ID.
6. On Server Configuration, modify the SQL Server Browser Startup Type to **Automatic**.
7. On Database Engine Configuration, enable **Mixed Mode (SQL server authentication and Windows authentication)** provide a password for administrator (sa) account. Select **Add Current User** to register the logged on desktop user as a SQL Server Administrator.

Microsoft SQL Server 2014 Express or SQL Server 2014 Standard Edition

Install Microsoft SQL Server 2014 Express with Tools

Note
The instructions for other versions may vary.

1. Download Microsoft SQL Server 2014 Express with Tools (SQLEXPRWT_x64_xxx.exe). The software can be downloaded from the Microsoft SQL Server Express site: http://www.microsoft.com/en-us/download/details.aspx?id=42299.

   xxx represents language code.
2. Install SQL Server 2014 SP1 Express with Tools.
   a) Launch the SQLEXPRWT_x64_xxx.exe.
   b) Select a directory where you want the files extracted and select **OK**.
   c) On SQL Server Installation Center Dialog, select **New SQL Server stand-alone or add features to an existing installation**.
   d) On the License Terms, accept the terms. Click **Next**.
   e) On Microsoft Updates, click **Use Microsoft Update to check for updates (recommended)** and then click **Next**. Updates will automatically download and install.
   f) On Feature Selection, click **Next**.

g) On Instance Configuration, select **Named Instance**. Click **Next**.

   You may optionally change the instance ID. The Instance ID is required during the Xerox® FreeFlow® Core installation.

h) On Server Configuration, modify the **SQL Server Browser Startup Type** to **Automatic**. Click **Next**.

i) On Database Engine Configuration, for Authentication Mode, select **Mixed Mode**. Enter a password for the "sa" account. Click **Next**.

   The "sa" account password is required during FreeFlow Core installation.

j) Once the installation is complete, click **Close**.

k) Close the SQL Server Installation Center.

Install Microsoft SQL Server 2014 Standard

Install SQL Server following instructions provided by Microsoft using the following options.

1. On SQL Server Installation Center dialog, select **Install** from the left side.
2. On SQL Server Installation Center dialog, select **New SQL Server stand-alone installation or add features to an existing installation**.
3. In the Setup Support Rules dialog, click **OK**.
4. In the Product Key dialog, enter the Product Key.
5. On the License Terms, accept the terms.
6. In the Setup Roles dialog, select **SQL Server Feature Installation**.
7. In the Feature Selection dialog, select the following options, the same as SQL EXPRESS:

   a) SQL Server Replication
   b) Management Tools - Complete
   c) SQL Client Connectivity SDK

8. On Instance Configuration, select **Named Instance** and specify a named instance, for example, FREEFLOWCORE.

   Do not use MSSQLSERVER as the instance ID. The FreeFlow Core installation will fail to configure the database if this is the instance ID.

9. On Server Configuration, if it is not already selected, modify the SQL Server Browser Startup Type to **Automatic**.
10. On Database Engine Configuration, enable **Mixed Mode (SQL server authentication and Windows authentication)** and provide a password for the administrator (sa) account. Select **Add Current User** to register the logged on desktop user as a SQL Server Administrator.
11. Select **Install** to install the software.

Optional for Microsoft Office Conversion

If you are planning to convert Microsoft Office files, install Microsoft Office 2013 64-bit per the instructions from Microsoft.

The Microsoft Office application suite must be installed prior to installing the FreeFlow product to ensure proper operation of the system. After installing the Microsoft Office application suite, you must open these applications and register them before performing any conversions.

Optional for Installing with Remote SQL Server Database

If you are planning to configure FreeFlow Core with a remote SQL Server database, prior to the installation of FreeFlow Core, please ensure the FreeFlow Core system can access remote SQL Server Database.

Installing the Prerequisites

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Installing Xerox® FreeFlow® Core

This FreeFlow product is offered subject to your acceptance of the license agreement included with the software and is subject to limited warranty terms. See the FreeFlow Core Software License Agreement for details.

FreeFlow Core Licensing

Trial License

FreeFlow Core may be installed in trial mode for 45 days without a license. The trial version is fully functional with the exception that connectivity is limited to two printer destinations, and will cease to function after 45 days.

Production License

The FreeFlow Core Enablement Kit delivered with your order contains your Activation key(s) and Product Serial Number. Depending on your product configuration you will receive one or more Enablement kits with an Activation key for each module.

FreeFlow Core may be licensed during installation over the Internet. If the FreeFlow Core server does not have access to the Internet you will need to obtain a license file using the Xerox Software Activation Portal:
1. Open the Software Activation Portal website:

   https://www.xeroxlicensing.xerox.com/activation/
2. Enter your Activation Key. Click **Next**.
3. Enter your Hardware Address (MAC ID).
4. Enter your Serial Number. Click **Next**.

5. Enter all FreeFlow Core requested User Information. Click **Next**.
6. Review the license information.
   a) Select **Back** to make changes
   b) Select **Activate Another License** to redeem additional Activation Keys.
   c) Once you have redeemed all Activation Keys, select **Save and Download License File** to save the file to the local system.
7. Close the web browser to exit the Software Activation Portal.

   Each time an Activation Key for an optional module is redeemed subsequent to redeeming the Activation Key for the FreeFlow Core Base software, the license for the optional module(s) is appended to the Base software license file. If all Activation Keys are redeemed in succession as described above, the final license file received will include entitlement for the Base software and any/all optional modules.

   If all Activation Keys are not redeemed, the optional module(s) for which an Activation Key(s) has not been redeemed will not be licensed or enabled in the software. To resolve this, repeat the steps described above in order to append the Activation Key(s) for the additional option(s) to the existing license file, and re-download the license file.

Backup License

You must obtain a valid backup license file from Xerox before installing the software. Do not attempt to license the software over the Internet or use the Xerox Software Activation Portal to obtain a license during the installation process. Refer to the instructions that came with your FreeFlow Core backup software Enablement kit for a Xerox Licensing Center in your region.

The license for the backup system includes license entitlement for all FreeFlow Core optional modules purchased with the production system.

Installing Xerox® FreeFlow® Core

Note

The FreeFlow Core software should be installed on your largest internal hard drive. Disable antivirus software during the installation process.

1. Double-click **FreeFlowCore-4.0.x.x-Setup.exe** to run the file.
2. Select **Yes**, if prompted, to allow an unknown publisher to make changes to this computer.
3. Select the desired language for the Installer user interface to display and click **OK**.
4. In the Welcome window, click **Next**.
5. In the Custom window, click **Next**.
6. In the License Agreement window, accept the terms of the license agreement and click **Next**.

7. If necessary, change the destination and workflow data folder so that FreeFlow Core is installed on your largest hard drive partition, and click **Next**.

8. If the required prerequisites are not configured and a System Check log appears, do the following:

    a) Cancel the FreeFlow Core installation.

    b) Look for the "ERROR"s and configure the appropriate requirements per instructions above.

    c) Return to the FreeFlow Core installation.

9. Add a license.

    a) If you have a license file select **Add or Change license dat file** and select the license file using the open file dialog. Click **Next**.

    b) If you have an Activation key, select **License over the Internet using Activation Key**. Click **Next**. The License Tool opens.

    1. **Select Download license from Software Activation Porta**l. Click **Next**.

    2. On the SWAP Instructions, click **Next**.

    3. Enter the required information on the next two screens and click **Next**. The license is automatically added to your system.

    Note

    You must use the FreeFlow Core Base Activation Key during installation. If the FreeFlow Core configuration contains optional modules, refer to Section 5, License Updates, once you complete the installation in order to update the FreeFlow Core license and enable the additional optional module(s).

    4. Click **Finish**. The License Tool closes. Click **Next** to continue the FreeFlow Core installation without rebooting.

    5. Click **Next** to continue the FreeFlow Core installation without rebooting.

    c) If installing a 45 day trial, select **Install Trial Software**. Click **Next**.

10. Enter the SQL Server database information. Click **Next**.

    a) Enter the System Administrator name (i.e. sa).

    b) Enter the System Administrator password defined during SQL Server installation as the password.

    c) Enter the Instance ID during SQL Server installation as the Database Instance ID.

    The Server name in SQL Server is formatted as <hostname>\<Instance ID>. Only the Instance ID is required.

    d) Enter **localhost** as the Database System Hostname if using a local database or the hostname if using a remote database.

11. Click **Install** to begin installation.

12. Upon completion, click **Finish** and then **Yes** to restart the system.

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Optional Installation Procedures

Windows Shared Folders or Microsoft Office Conversion Setup

File access using Windows Shared Folders and conversion of Microsoft Office files require use of a Windows account for the FreeFlow Core service.

This Windows account must have:

- Local Administrator rights to the FreeFlow Core server.
- Ownership of the OapPlatformDatabase in the SQL Server instance defined during installation.
- Ownership of the oapeventmessagequeue in Message Queueing.
- Access to the required Windows Shared Folders.

Use of the account that was used to install SQL Server as the Windows account for the FreeFlow Core service is recommended. That account meets the first two requirements, above.

Setting the FreeFlow Core Service Logon for Windows 7 SP1 (64-bit)

1. Right-click **My Computer** and select **Manage** to launch Computer Management.
2. Select **Services and Applications > Services**.

3. To stop the service, right-click **FreeFlow Core** service and click **Stop**.
4. Right-click **FreeFlow Core** service and click **Properties**.
5. Click the **Log On** tab and click **This Account**. Click **Browse**.
6. Under Enter the object name to select, enter the name of the service account, such as Administrator, and click **Check Names**.
7. Click **OK**.
8. Enter the password and click **OK**.
9. Click **OK** to confirmation messages.
10. Right-click on the **FreeFlow Core** service and click **Start** to start the service.

Setting the Message Queuing Security for Windows 7 SP1 (64-bit)

1. Right-click **My Computer** and select **Manage** to launch Computer Management.
2. Select **Services and Applications > Message Queuing > Private Queues**.
3. Right-click **oapeventmessagequeue** and click **Properties**.
4. Click the **Security** tab and click **Add**.
5. Under Enter the object name to select, enter the name of the service account, such as Administrator. Click **Check Names** and click **OK**.

   The service account must be the account used for the FreeFlow Core service logon.
6. Under Permissions for Administrator, check **Full Control** and click **OK** to allow all permissions.

Adding Shared Folders Credentials to the Windows Account

If the Windows account used for the FreeFlow Core service has access to the shared folders then additional configuration is not required.

Note

Shared folders must be UNCs (e.g. \\<server>\<path>\file.ext). Mapped drives are not supported.

To validate access to a shared folder:
1. Log into the FreeFlow Core server using the Windows account used for the FreeFlow Core service.
2. Launch **Run**.
3. Type the UNC to a folder or file in the shared directory and select **OK**.
   The file or folder will open without prompting for credentials.

Add Credentials to Windows 7 Account

If needed, credentials can be added to the Windows account used for the FreeFlow Core service.

1. Select **Control Panel > User Accounts and Family Safety > Credential Manager**.
2. Select **Add a Windows Credential**.
3. Specify the server **Internet or network address** and a valid **User name** and **Password**. Click **OK**.
4. Validate access per instructions above.

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Post Installation Steps

Understanding System Startup

Windows services start in three separate phases:

1. Operating System Services launch before other services. As such, IIS is available before SQL Server or FreeFlow Core start up.

2. Services set to Automatic startup launch after all Operating System Services are running. As such, SQL Server will startup before FreeFlow Core starts up.

3. Services set to Automatic (Delayed Start) launch after all services set to Automatic startup are running. This ensures SQL Server is available when FreeFlow Core starts up.

If you attempt to open the FreeFlow Core UI before FreeFlow Core is running you will see a message asking to wait for FreeFlow Core to initialize. That message should change to a login screen after FreeFlow Core starts up. If the message times out, you should refresh the browser window.

Create an Administrator Account

1. Open the FreeFlow Core UI: Select **Start** > **All Programs** > **Xerox** > **FreeFlow Core** > **FreeFlow Core**.

   To access FreeFlow® Core from a remote system, go to the following URL:

   http://<hostname or ip address of FreeFlow Core server>/freeflowcore

2. If prompted to load Silverlight, select **Click now to install**, and follow the instructions. Once it is installed, close your browser, and relaunch FreeFlow Core.

3. Enter the Username and Password for an administrator account. You will log on after the account is created.

License Updates

You may need to update the FreeFlow Core license.

- If the FreeFlow Core configuration contains optional modules and you elected to License over the Internet using Activation Key during installation.

- When upgrading a Trial license to a Production license.

- When purchasing additional modules for an existing installation.

To update the FreeFlow Core license, first determine which method you will use to redeem your Activation Key(s), then follow the applicable procedure outlined below.

1. License the software over the Internet using an Activation Key (requires a connection to the Internet on the FreeFlow Core server).

2. Obtain a license from the Xerox Software Activation Portal using a web browser (any Internet-connected computer).

Licensing Using an Activation Key in FreeFlow Core

To license the software over the Internet using an Activation Key:
1. Select **Start > All Programs > XeroxFreeFlow Core > License Tool**.
2. Select **Download license from the Software Activation Portal (SWAP)**. Click **Next**.
3. On the SWAP Instructions page, click **Next**.
4. Enter the required information on the next two screens and click **Next**. The license is automatically added to your system.
5. Click **Finish**. The License Tool closes.
6. Repeat the steps above to license additional optional modules, as necessary.
7. Reboot the system when all license files have been installed or when all Activation Keys have been redeemed.

Licensing Using a Web Browser

To obtain a license from the Xerox Software Activation Portal using a web browser, or if the FreeFlow Core system does not have access to the Internet:
1. Open the Xerox Software Activation Portal (SWAP) website: https://www.xeroxlicensing.xerox.com/activation/
2. Enter your Activation Key. Click **Next**.
3. Enter your Hardware Address (MAC ID).
4. Enter your Serial Number. Click **Next**.
5. Enter all FreeFlow Core requested User Information. Click **Next**.
    a) Select **Back** to make changes.
    b) Select **Activate Another License** to redeem additional Activation Keys.

    c) Once you have redeemed all Activation Keys, select **Save and Download License File** to save the file to the local system.

    d) Close the web browser to exit the Software Activation Portal.

6. Copy the license file to the local hard drive on the FreeFlow Core server, if necessary.
7. Select **Start**. Type "License" and select **License Tool** from the search results.
8. Select **Load license from DAT file(s)**. Click **Next**.
9. Select **Load license DAT file**and locate the license file you copied to the local system.
10. Select **Finish**.
11. Reboot the system.

Each time an Activation Key for an optional module is redeemed subsequent to redeeming the Activation Key for the FreeFlow Core Base software, the license for the optional module(s) is appended to the Base software license file. If all Activation Keys are redeemed in succession, the final license file received will include entitlement for the Base software and any/all optional modules and only needs to be installed once unless additional optional modules are added to an existing installation.

Viewing FreeFlow Core License Status

You can view information about your licensing configuration on your FreeFlow Core application.

1. Start the FreeFlow Core application.
2. On the top of the screen, click **Licensing Information**.

Easy Start Workflows

To configure your system with predefined workflows, download the FreeFlow Core Easy Starts package from the Drivers & Downloads section of the FreeFlow Core webpage http://xerox.com/automate and follow the provided instructions.

Windows Firewall and Virus Protection

Windows firewall enablement and configuration details are provided in the FreeFlow Core Security Guide. This guide also includes anti-virus software configuration recommendations. The FreeFlow Core Security Guide is available from the Xerox Security Information website: http://www.xerox.com/information-security/

Internet Explorer 10 and Higher

Set the browser to compatibility view mode and restart it before using the browser with FreeFlow Core. If the browser is not set to run in compatibility view, the Silverlight application freezes.

Safari on Mac OS X 10.9 Mavericks

1. Open the FreeFlow Core UI.
2. Go to **Preferences > Security > Internet plug-ins > Manage Website Settings**.
3. Set the Silverlight plugin to **Always Allow**. If the Silverlight plugin is set to **Run in Safe Mode** file uploads will fail.

6

Upgrades

Review Chapter 2, Installing the Prerequisites, for FreeFlow Core 4.0 configuration requirements that were not required for FreeFlow Core 3.0.

In order to perform the upgrade, you will need to obtain a new license(s) for version 4.0 using your existing FreeFlow Core 3.0 product Serial Number and Activation Key(s).

Obtaining a New License

To update the FreeFlow Core license:
1. Open the Xerox Software Activation Portal (SWAP) website: https://www.xeroxlicensing.xerox.com/activation/.
2. Enter your Activation Key. Click **Next**.
3. Enter your Hardware Address (MAC ID).
4. Enter your Serial Number. Click **Next**.
5. Enter all FreeFlow Core requested User Information. Click **Next**.
   a) Select **Back** to make changes.
   b) Select **Activate Another License** to redeem additional Activation Keys.
   c) Once you have redeemed all Activation Keys, select **Save and Download License File** to save the file to the local system.
   d) Close the web browser to exit the Software Activation Portal.
6. Upload the license file in FreeFlow Core as outlined in Upgrade Procedure below.

   Each time an Activation Key for an optional module is redeemed subsequent to redeeming the Activation Key for the FreeFlow Core Base software, the license for the optional module(s) is appended to the Base software license file. If all Activation Keys are redeemed in succession, the final license file received will include entitlement for the Base software and any/all optional modules and only needs to be installed once unless additional optional modules are added to an existing installation.

If all Activation Keys are not redeemed, the optional module(s) for which an Activation Key(s) has not been redeemed will not be licensed or enabled in the software. To resolve this, repeat the steps described above in order to append the Activation Key(s) for the additional option(s) to the existing license file, and re-download the license file.

Upgrading from Xerox® FreeFlow Core 3.0

Once you have obtained a new license for version 4.0, and the additional prerequisites have been enabled, upgrade to FreeFlow Core 4.0. The additional requirements can be installed manually or they can be installed automatically with the preinstaller:

1. Double-click **FreeFlowCore-4.0.x.x-PreInstall_yy.exe**.

   yy represents the language code.
2. In the FreeFlow Core 4.0 Prerequisites Tool window, select **Next**.
3. In the Database Settings window, skip creating a new database instance by clicking **Next**.
4. Click **Finish** when the pre-installation completes.
5. Once the additional prerequisites are enabled, upgrade to FreeFlow Core 4.0 SP1. Double-click **FreeFlowCore-4.0.x.x-Setup.exe** to run the file.
6. Select the desired language for the Installer user interface to display and click **OK**.
7. In the Welcome window, click **Next**.
8. In the Custom window, click **Next**.
9. In the License Agreement window, accept the terms of the license agreement and click **Next**.
10. For upgrades, do not change the install folders. Click **Next**.
11. If the required prerequisites are not configured and a System Check log appears, do the following:
    a) Cancel the FreeFlow Core upgrade.
    b) Look for the "ERROR"s and configure the appropriate requirements per instructions above.
    c) Return to the FreeFlow Core upgrade.
12. Add your license file and click **Next**.
13. Enter the SQL Server database information. Click **Next**.
    a) Enter the System Administrator name (sa).
    b) Enter the System Administrator password defined during SQL Server installation as the password.
    c) Enter the Instance ID during SQL Server installation as Database Instance ID.
    d) Enter localhost as the Database System Hostname if using a local database or the hostname if using a remote database.
14. Click **Install** to begin installation.

15. When you are asked if you want to permanently delete your FreeFlow Core configuration, click **No**. This saves your configured workflows, presets, etc.
16. Click **OK** to confirm a reboot.
17. Upon completion, click **Finish** and then **Yes** if prompted to restart the system.

Optional

If you are using Windows Shared Folders or Microsoft Office Conversion, once you upgrade your system, you need to perform the following from the Optional Installation Procedures chapter:

- Setting the FreeFlow Core Service Logon
- Setting the Message Queuing Security

Upgrades