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Xerox® FreeFlow® Core Installation Guide

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Prerequisites

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Supported Operating Systems

- Windows Server 2012 R2 Update, Windows Server 2016, or Windows Server 2019 are recommended for most production environments.
- Windows 10 is recommended for environments with light workloads.
- FreeFlow® Core software is supported only on 64-bit Windows systems with .NET updated to 4.6.0 or higher. Windows 32-bit operating systems and .NET Core are not supported.
- Some versions of Microsoft SQL Server require that .NET 3.5 SP1 is enabled. For information, refer to the Microsoft SQL Server requirements.



Note: The following editions of all Microsoft Windows operating systems are not supported:

- S
- Core
- Mobile
- Internet of Things (IoT)
- Home
- Basic
- Team
- Preview

Required Third-Party Software

Microsoft SQL Server 2014 SP 1 or higher is required. Both Express and Standard editions are supported.

Optional Third-Party Software

- The following software is required for creating preflight profiles:
 - Adobe® Acrobat Pro
 - Callas pdfToolbox
- The following software is required for Microsoft Office Conversion: Microsoft® Office 2013, 64-bit or Microsoft® Office 2016, 64-bit with an appropriate language pack.
- The following software is required to open and view PDF files: Adobe Reader or other software that supports viewing PDF documents.



Note: For supported versions, refer to the *Xerox® FreeFlow® Core Release Notes*. To obtain the release notes, access the FreeFlow® Core webpage at <http://xerox.com/automate>. In the Owner Resources section, select **Drivers & Downloads**.

Supported Web Browsers

- For supported browsers, refer to the *Xerox® FreeFlow® Core Release Notes*. To obtain the release notes, access the FreeFlow® Core webpage at <http://xerox.com/automate>. In the Owner Resources section, select **Drivers & Downloads**.
- Browsers older than 1 year are not supported. To avoid compatibility issues, update browsers to the newest version.
- Use desktop computer browsers. Some mobile device browsers have screen-limitation issues.

Prerequisites

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Installing Xerox® FreeFlow® Core Software

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Xerox® FreeFlow® Core Licensing

Trial License

You can install FreeFlow® Core software in Trial mode, without a license. The Trial version includes all optional modules and is fully functional for 45 days.

Production License

The FreeFlow® Core Enablement Kit delivered with your order contains your activation key and product serial number. Depending on your product configuration, for each module, you receive one or more Enablement Kits with an activation key.

 **Note:**


- The first time that you acquire a license, enter the activation keys for your entire software configuration. For example, if your software configuration includes the base software and the Advanced Prepress module, redeem each activation key individually.
- If you obtain the license file using the Xerox Software Activation Portal (SWAP), before you download the license file, redeem all activation keys.
- If you obtain a license from the Internet, refer to [License Updates](#) in this guide.

You can license FreeFlow® Core software during installation over the Internet. If the FreeFlow® Core server does not have access to the Internet, obtain a license file using the Xerox SWAP.

1. To obtain a license file, access the Xerox SWAP website: <https://www.xeroxlicensing.xerox.com/activation/>
2. Enter your activation key. Click **Next**.
3. Enter all required customer information. Click **Next**.
4. Review the license information.
 - To make changes to the license information, select **Back**.
 - To redeem additional activation keys, select **Activate Another License**.
 - After you have redeemed all activation keys, to save the file to the local system, select **Save and Download License File**.
5. To exit the Xerox SWAP, close the Web browser.

Optional Backup License

Before installing a backup copy of FreeFlow® Core software, obtain a valid backup license file from Xerox.



 **Note:** Do not attempt to license the backup software over the Internet. Do not use the Xerox Software Activation Portal (SWAP) to obtain a backup license during the installation process. Follow the instructions that shipped with your FreeFlow® Core backup Software Enablement Kit, as provided by your Xerox Licensing Center.

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

Preparing for System Installation

1. Install all Windows Updates.
2. Ensure that the operating system where the FreeFlow® Core software is installed is configured with a static IP address.
3. If a local copy of the Microsoft SQL Server is not present on your system, the FreeFlow® Core installer installs a local copy of Microsoft SQL Server Express. Before you install FreeFlow® Core, you can install Microsoft SQL Server Standard or Express on the local FreeFlow® Core server or on a remote server, if needed. To install Microsoft SQL Server on a remote server, refer to the Microsoft installation information.
 - Use of a named database instance is recommended.
 - It is recommended to install the database instance with mixed-mode authentication.
 - Use of SQL authentication with the SA (system administrator) account is supported, but not recommended. If you use a custom database account, ensure that the account has system administrator privileges on the database instance.
 - Installing the database instance on a compressed volume is not supported.
4. If Microsoft Office file-conversion software is required, before installing the FreeFlow® Core software, install Microsoft Office 2013 or 2016, 64 bits. For more information, refer to [Optional Installation Procedures](#).

Installing the Xerox® FreeFlow® Core Software

1. Double-click **FreeFlowCore-5.3.0-Setup.exe**. If you see an onscreen prompt to reboot, restart the system, then run the installer again.
2. To display the installer user interface, select your language, then click **OK**.
3. If the prerequisites are not configured, and a System Check log appears, perform the following steps:
 - a. Cancel the FreeFlow® Core installation.
 - b. In the System Check log, search Errors.
 **Note:** When you install FreeFlow® Core with a remote database instance, sometimes the system check displays the error message `SQL Server not found`. You can ignore the error message.
 - c. Continue the installation for the FreeFlow® Core software.
4. If you receive an onscreen prompt to reboot, restart the system.
5. Restart the FreeFlow® Core installer.
6. In the Welcome window, click **Next**, then follow the onscreen instructions. The onscreen information depends on the state of your system.
 - a. In the License Agreement window, read and accept the terms of the license agreement. Click **Next**.
 - b. In the Destination Folder window, change the workflow data folder to install the software on your largest hard drive partition. Click **Next**.
7. Add a license. Choose one of the following:
 - If you have a license file, select **Add or Change license dat file**. Use the open file dialog, then select the license file. Click **Next**, then continue to [Step 9.](#)
 - If you have an Activation Key, select **License over the Internet using Activation Key**. Click **Next**. The License Tool opens. Continue to the next step.
 - To install a 45-day trial license, select **Install Trial Software**. Click **Next**, then continue to [Step 9.](#)
8. From the License Tool, perform the following steps:
 - a. Select **Download license from Software Activation Portal**. Click **Next**.
 - b. On the SWAP Instructions, click **Next**.
 - c. On the next two screens, enter the required information, then click **Next**. The license is added automatically to your system.
 **Note:** During installation, ensure that you use the FreeFlow® Core Base Activation Key. If the FreeFlow® Core configuration contains optional modules, you can enable the modules now. To enable the optional modules after installation, refer to [License Updates](#).
 - d. To close the Core License tool, click **Finish**.
 - e. To continue the FreeFlow® Core installation without rebooting, click **Next**.
9. Enter the Database Administration information. Click **Next**.

- a. For a Database installed on the FreeFlow® Core Server:
 - For a domain account, enter the administrator name in this format: <domain>\<user-name>.
 - For a local account, enter the administrator name in one of the two formats: <host-name>\<user-name> or <user-name>.
 - The FreeFlow® Core installer differs from the Microsoft SQL Server installer where the host name and instance ID are entered into separate fields.
 - b. For a Remote Database installed on a separate Database Server:
 - For a domain account, enter the administrator name in this format: <domain>\<user-name>.
 - Local accounts are not supported when you use a remote database.
 - The FreeFlow® Core installer differs from the Microsoft SQL Server installer where the host name and instance ID are entered into separate fields.
 - Enter the remote server name as one of the following: a Fully Qualified Domain Name (FQDN), DNS name, or IP address.
10. If you use the Microsoft Office conversion software, enter the name of the Windows account that runs the FreeFlow® Core services, or select the check box for the local system account.



Note: For a remote database configured with mixed-mode authentication, the local system account is not supported.

If you use a Domain Account:

- Enter the domain account in this format: <domain>\<user-name>.
- Enter the domain account password.

If you use a Local Account:

- Enter the username in one of the two formats: <host-name>\<user-name> or <user-name>.
- Enter the local account password.



Note: The installer configures the services and MSMQ automatically, using the Windows account credentials. To change the settings after installation, from the Windows Start menu, use the Core Configuration tool.

11. After installation completes, to restart the system, click **Finish**, then click **Yes**.

License Updates

If any of the following conditions exist, update the FreeFlow® Core license:

- FreeFlow® Core configuration contains optional modules, and you elected to license over the Internet, using the activation key during installation.
- You want to upgrade a Trial license to a Production license.

To update FreeFlow® Core software licensing:

1. From the Windows Start menu, run the **Core License Tool**.
2. For each license file or activation key, follow the FreeFlow® Core installation instructions for the *Production License* topic.
3. When all license files are installed, or when all activation keys are redeemed, restart the system.

Optional Installation Procedures

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Windows Shared Folders or Microsoft Office Conversion Setup

If you use Shared Windows Directories or Microsoft Office file-conversion software, a valid service account is required to run the FreeFlow® Core software.


To change the settings, from the Windows Start menu, use the **Core Configure tool**.

The service account includes the following features:

- Runs FreeFlow® Core services.
- Has Full Control over the OAP Message Queue.
- Has access to Shared Windows Directories.

Adding Shared Folder Credentials to the Windows Account

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

 **Note:** Shared folders follow the Universal Naming Convention (UNC), and list the full path. For example: \\<server>\<path>\file.ext. Mapped drives are not supported.

1. To validate access to a shared folder, log in to the FreeFlow® Core server using the same Windows account that you used for the FreeFlow® Core services.
2. From the Windows Start menu, select **Run**.
3. Type the UNC path to a folder or file in the shared directory. Click **OK**.

The file or folder opens without prompting for login credentials.

Add Credentials to a Windows Account

If needed, you can add credentials to the Windows account used for the FreeFlow® Core service.

1. Select **Control Panel**→**User Accounts**→**Credential Manager**→**Windows Credentials**.
2. Click **Add a Windows Credential**.
3. Specify the server Internet or network address and a valid user name and password. Click **OK**.
4. Validate access to the server.

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Create an Administrator Account

1. Access the FreeFlow® Core user interface. From the Windows Start menu, select **FreeFlow Core**.



Note: To access the FreeFlow® Core server from a remote system browser, access the hostname URL: `http://<host-name>/freeflowcore`, or use the IP address of the FreeFlow® Core server: `http://<ip-address>/freeflowcore`.

2. For the Username and Password fields, enter the administrator account credentials. After an account creation, log in.

Easy Start Workflows

To configure your system with predefined workflows, download the Xerox® FreeFlow® Core Easy Start package from the Owner Resources. Access the Xerox® FreeFlow® Core web page <http://xerox.com/automate>, select **Drivers & Downloads**, then follow the onscreen instructions.

Windows Firewall and Virus Protection

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

Upgrades

For upgrade instructions, refer to the *Xerox® FreeFlow® Core Release Notes*. To obtain the release notes, access the FreeFlow® Core webpage at <http://xerox.com/automate>. In the Owner Resources section, select **Drivers & Downloads**.

