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Xerox® FreeFlow® Core Installation Guide

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Prerequisites

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Server Software Requirements

For the latest server requirements, refer to *Xerox® FreeFlow® Core Release Notes*. To obtain the document, access the FreeFlow® Core webpage at <https://xerox.com/automate>. In the Owner Resources section, select **Drivers & Downloads**.

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Installing Xerox® FreeFlow® Core Software

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Xerox® FreeFlow® Core Licensing

Trial License

You can install FreeFlow® Core in Trial mode without a license. The Trial version includes all optional modules, including connectivity for up to two output destinations, and is fully functional for 45 days.

Production License

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

 **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 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 more activation keys, select **Activate Another License**.
 - After you have redeemed all activation keys, select **Save and Download License File**. To save the file to the local file system, select **Save and Download License File**.
5. To exit the Xerox SWAP, close the Web browser.

Optional Backup License

Before you install a backup copy of the FreeFlow® Core software, to obtain a valid backup license file, contact your local Xerox Technical Customer Support or Xerox partner.

 **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 are included with your FreeFlow® Core backup Software License Enablement Kit.

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

Preparing for System Installation

1. If you are installing FreeFlow® Core in a secure environment, identify a valid account to use to access FreeFlow® Core optional shared folders and the SQL Server. If you are unsure if your account is a valid account, before you proceed, contact Xerox Technical Customer Support.
2. Install all Windows Updates.
3. Ensure that the operating system where FreeFlow® Core is installed is configured with a static IP address.
4. Install Microsoft SQL Server Standard or Express:
 - It is recommended to use a named database instance.
 - It is recommended to install the database instance with mixed-mode authentication.
 - It is not recommended to use SQL authentication with the system administrator account. However, this option is supported. If you use a custom database account, ensure that the account has system administrator privileges on the database instance.
 - If you install SQL Server manually on the local server, ensure that you are logged in as the same user that operates the FreeFlow Core server.
 - Installing the database instance on a compressed volume is not supported.



Note: Before you install FreeFlow® Core, ensure that Microsoft SQL Server Standard or Express is installed and configured on the local FreeFlow® Core server or on a remote server.

If a local copy of the Microsoft SQL Server is not present on the FreeFlow® Core server, the FreeFlow Core Installer presents you with the opportunity to install a local copy of Microsoft SQL Server Express.

You can install Microsoft SQL Server Standard or Express manually on the local FreeFlow Core server or on a remote server. To install Microsoft SQL Server on a remote server, refer to the Microsoft SQL installation guide.

5. Install Microsoft Office, if Microsoft Office conversion is required. Before you install FreeFlow® Core for supported versions of Microsoft Office, refer the *Xerox® FreeFlow® Core Release Notes*. For more information, refer to [Optional Installation Procedures](#).

Installing the Xerox® FreeFlow® Core Software

1. Double-click **XeroxFreeFlowCore-5.n.n-Setup.exe**. If you see an onscreen prompt to restart, restart the server, then run the installer again.



Note: Wait several minutes for the operating system to fully initialize, then double-click the installer to continue the installation process.

If you receive a message that indicates that an error occurred during the attempt to configure server roles and features, wait approximately 5–10 minutes before you restart the installer. If the problem persists, contact Xerox Technical Customer Support for assistance.

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 for the words `ERROR`, then resolve any problems, before you continue the installation. If you require assistance, contact Xerox Technical Customer Support.



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 of FreeFlow® Core.
4. If you receive an onscreen prompt to restart, restart the server.
 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 server.
 - 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 11.](#)
 - If you have an Activation Key, select **License over the Internet using Activation Key**. Click **Next**. The Core License utility opens. Continue to the next step.
 - To install a 45-day trial license, select **Install Trial Software**. Click **Next**, then continue to [Step 11.](#)
 8. From the license tool, perform the following steps:
 - a. Select **Download license from Software Activation Portal**. Click **Next**.
 - b. On the SWAP Instruction screen, 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 license tool, click **Finish**.

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>. Enter the domain account password.
- For a local account, enter the administrator name in one of the following two formats: <host-name>\<user-name> or <user-name>. Enter the local account password.
- The FreeFlow® Core installer differs from the Microsoft® SQL Server installer. The host name and instance ID are entered in 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>. Enter the domain account password.
- Local accounts are not supported when you use a remote database.
- The FreeFlow® Core installer differs from the Microsoft® SQL Server installer. The host name and instance ID are entered in separate fields.
- Enter the remote server name as one of the following: A Fully Qualified Domain Name (FQDN), a DNS name, or an IP address.



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

10. If are using Microsoft Office file conversion, or remote file shares for Hot Folder or output, do one of the following:

- Enter the name of the Windows account that runs the FreeFlow® Core services, or
- Select the check box for the local system account.

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 user name 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 Configure utility.

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

License Updates

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

- FreeFlow® Core configuration contains optional modules, and during installation, you elected to license over the Internet, using the activation key.
- 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 utility**.
2. For each license file or activation key, follow the FreeFlow® Core installation production license instructions. Refer to [Production License](#).
3. When all license files are installed, or when all activation keys are redeemed, restart the server.

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

The service account includes the following features:

- Runs FreeFlow® Core services
- Has full control over the FreeFlow Core message queue
- Has access to Shared Windows Directories

Adding Shared Folder Credentials to the Windows Account

If the Windows account that is 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.

Adding Credentials to a Windows Account

If needed, you can add credentials to the Windows account that is used for the FreeFlow® Core service. Consult with your local IT department, if necessary, to determine the requirements at your location.

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



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

2. To create an administrator account, for the Username and Password fields, enter the administrator account credentials.

Easy Start Workflows

To configure your server with predefined workflows, download the Xerox® FreeFlow® Core Easy Start package from the Owner Resources. Access the Xerox® FreeFlow® Core webpage <http://xerox.com/automate>, To download the East Start Workflows, access the FreeFlow Core webpage at <https://xerox.com/automate>. In the Owner Resources section, select **Drivers & Downloads**.

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 *Security Guide* is available from the Xerox Security Information website at <https://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 <https://xerox.com/automate>. In the Owner Resources section, select **Drivers & Downloads**.

Upgrades

