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Xerox® FreeFlow® Core

Installation Guide: Windows Server 2012 R2

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1

Prerequisites

Supported Operating Systems

- 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– Recommended for most production environments.

Note

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

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 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 Server 2008 R2, Windows Server 2012, and Windows Server 2012 R2
- Firefox 27 or higher on Windows 7 (64-bit), Windows Server 2008 R2, Windows Server 2012, and Windows Server 2012 R2
- 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

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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 from http://www.microsoft.com/en-us/download/details.aspx?id=22.

.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 8.5 on Windows Server 2012 R2

1. Launch **Server Manager**.
2. To launch the Add Roles and Features Wizard, select **Add roles and features** from the Welcome Tile and click **Next**.

   Note

   Always select **Add Features** or **OK** when popup windows prompt to add features that are required for a selected feature.

3. Select **Role-based or feature-based installation** and click **Next**.
4. Select **Next** to select the local server.

5. Under Roles, select **Web Server (IIS)** and click **Next**.
6. Select the following features:
   - .Net Framework 4.5 Features
     - .NET Framework 4.5
     - ASP.NET 4.5
     - WCF Services
       - HTTP Activation
       - Message Queuing (MSMQ) Activation
       - TCP Port Sharing
   - Message Queuing*
     - Message Queuing Services*
       - Message Queuing Server*
       - Directory Service Integration*
       - HTTP Support*
7. Select **Next** twice.
8. Select the following Role Services for the Web Server Role (IIS):
   - Common HTTP Features
     - Default Document
     - Directory Browsing
     - HTTP Errors
     - Static Content
     - HTTP Redirection*
   - Health and Diagnostics
     - HTTP Logging
     - Logging Tools*
     - Request Monitor
     - Tracing*
   - Performance
     - Static Content Compression
   - Security
     - Request Filtering

    - Basic Authentication
    - Windows Authentication

- Application Development
    - .NET Extensibility 4.5
    - ASP.NET 4.5
    - ISAPI Extensions
    - ISAPI Filters

- Management Tools
    - IIS Management Console
    - IIS 6 Management Compatibility
        - IIS 6 Metabase Compatibility
        - IIS 6 Management Console

9. Select **Next**. Enable the **Restart the destination server automatically if required** option and select **Install**.
10. Close the Add Roles and Features Wizard after installation. The server restarts if required.

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)

Install Microsoft SQL Server 2012 Express with Tools

Note

The instructions for other versions may vary.

1. Download Microsoft SQL Server 2012 SP1 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.

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.

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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.

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 Program Features 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.

   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 30 day trial, select **Install Trial Software**. Click **Next**.

10. Enter the SQL Server database information. Click **Next**.
a) Enter sa as the System Administrator name.
b) Enter the sa 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.

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 Server 2012 R2

1. Launch **Server Manager**.
2. Select **Tools > Computer Management**.

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

Setting the Message Queuing Security for Windows Server 2012 R2

1. Launch **Server Manager**.
2. Select **Tools > Computer Management**.
3. Select **Services and Applications > Message Queuing > Private Queues**.
4. Right-click **oapeventmessagequeue** and click **Properties**.
5. Click the **Security** tab and click **Add**.
6. 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.
7. Click **OK**.
8. 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 2012 R2 Account

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

1. Select **Control Panel > User Accounts > Credential Manager > Windows Credentials**.
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**. Type "FreeFlow" and select **FreeFlow Core** from the Search Results.

   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 licenses.

- 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 FreeFlow Core licensing:

1. Select **Start**. Type "License" and select **License Tool** from the Search Results.
2. For each license file or Activation Key, follow the **Add a license** step in the Installing FreeFlow Core installation instructions.
3. Reboot when all license files have been installed or when all Activation Keys have been redeemed.

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

Upgrading from Xerox FreeFlow Core 3.0

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

Once the additional prerequisites are enabled, upgrade to FreeFlow Core 4.0:

1. Double-click **FreeFlowCore-4.0.x.x-Setup.exe** to run the file.
2. Select the desired language for the Installer user interface to display and click **OK**.
3. In the Welcome window, click **Next**.
4. In the Program Features window, click **Next**.
5. In the License Agreement window, accept the terms of the license agreement and click **Next**.
6. For upgrades, do not change the install folders. Click **Next**.
7. 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.
8. Add your license file and click **Next**.
9. Enter the SQL Server database information. Click **Next**.
   a) Enter sa as the System Administrator name.
   b) Enter the sa 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.
10. Click **Install** to begin installation.
11. When you are asked if you want to permanently delete your FreeFlow Core configuration, click **No**. This saves your configured workflows, presets, etc.
12. Click **OK** to confirm a reboot.

13. 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

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