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# FreeFlow Process Manager<sup>®</sup>

## Post-Installation Guide



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## Post-Installation Procedures

The purpose of this document is to guide you through the FreeFlow Process Manager post-installation procedures.

This chapter provides a Post Installation Checklist which must be completed after your Process Manager system has been installed.

### NOTE

This document assumes that a Xerox Representative has performed the installation of the Process Manager product.

## Post-installation setup

The table below provides a post-installation checklist you must complete after your FreeFlow Process Manager system has been installed.

### NOTE

This checklist assumes that a Xerox Representative has installed of all hardware and software necessary to run the FreeFlow Process Manager system.

Procedure	Overview
Configure document repository connections	Use the FreeFlow Administration Tool to configure the connection between FreeFlow Process Manager and the supported document repositories.  For detailed procedures on configuring repository connections, refer to the FreeFlow Administration Tool online Help system.

Procedure	Overview
<p>Create user accounts; add or edit user contact information; change XDL Admin account password</p>	<p><b>Creating User Accounts</b></p> <p>Process Manager user accounts are created and managed using the Windows Local Users and Groups functionality in the Computer Management application. Users that are created and added to the appropriate Process Manager group accounts using Windows appear in the FreeFlow Administration Tool list of users.</p> <p><b>Storing User contact information</b></p> <p>The FreeFlow Administration Tool is used to view user accounts that have been created in Windows, and to add or edit user contact information.</p> <p><b>Changing the XDL Admin account password</b></p> <p>The FreeFlow Administration Tool allows you to change the password for the XDL Admin account. This password is set during the installation of the software.</p> <p>For detailed procedures on creating user accounts, refer to the Windows online help. For detailed procedures on adding or editing user contact information or changing the XDL Admin account password, refer to the FreeFlow Administration Tool online Help system.</p>
<p>Manage production printers for workflows</p>	<p>Production printers must be added to FreeFlow Process Manager before you attempt to drag a Print process into a workflow during the workflow building process.</p> <p>A common printer interface enables all FreeFlow applications to maintain a single database of configured printers and to have a common job setup GUI interface across FreeFlow applications. The common printer interface includes the following utilities:</p> <ul style="list-style-type: none"> <li>• <b>Registered Printer List Locator</b> Allows you to set whether the registered printer list in use by a FreeFlow application is located on a local computer or on a remote computer.</li> <li>• <b>Printer Registration</b> Allows you to register and manage supported production printers and queues for use by FreeFlow software applications. To configure the Print process step in a workflow, production printers must first be added via the FreeFlow Printer Registration application.</li> <li>• <b>Printer Status/Job Status Tool</b> Allows you to status jobs, queues, and printers.</li> </ul> <p>For additional information, refer to the online Help for the Registered Printer List Locator, Printer Registration, or the Printer Status/Job Status Tool.</p>

Procedure	Overview
Configure the SMTP server	<p>The Simple Mail Transport Protocol (SMTP) Server is used for e-mail notification. The SMTP Setup dialog, accessed via the Workflow Builder application, allows you to identify the mail server for outgoing mail or notifications, define authentication parameters, and establish the maximum size for e-mail attachments.</p> <p>For details, refer to the following procedure in the online help: "Setting up the SMTP Server."</p>
Set up workflows	<p>Three default workflows are provided with the software: Simple, Main, and Reprint. Modify these workflows or create your own, based on the needs of your organization.</p> <p>For details, refer to the following procedure in the online help: "Configuring process settings;" or "Building a new workflow."</p>
Generate the preflight profile repository on a clean install.	<p>Preflight profiles do not exist on a clean install. You will need to generate the profile repository.</p> <p>For details, refer to the following procedure in the online help: "Configuring preflight settings."</p>
Create or modify preflight profiles.	<p>You may want to modify the preflight profiles that are provided with FreeFlow Process Manager.</p> <p>For details, refer to the following procedure in the online help: "Creating preflight profiles."</p>
Set the default job option in Adobe Acrobat	<p>For the Convert process, you can select from various job options, or create custom job options, to generate optimal PDFs in Process Manager. The default job option that is displayed in Process Manager is selected in Adobe Acrobat Distiller. You can ensure that Process Manager displays the desired Adobe Acrobat Distiller default job option by selecting a profile from the Default Settings drop box in Acrobat Distiller.</p> <p>For details, refer to the following procedure in the online help: "Configuring Convert settings."</p>
Upgrade legacy workflows that contain the Job Level Edit process.	<p>In previous versions, 6.0 and below, of FreeFlow Process Manager, all job level edit functions (for example, watermarks, page numbering, page rotation) were available via a single Job Level Edit dialog. Legacy workflows that contain Job Level Edit processes will perform as they did in earlier versions, but you will not be able to edit them. To use previous versions (6.0 and below) job level edit functions, save the existing Job Level Edit workflow, and it will be converted into a series of individual, Watermark, Bates Numbering, Page Numbering, Flip and Rotate nodes, as appropriate.</p> <p>For details, refer to the following procedure in the online help: "Upgrading legacy workflows that contain the Job Level Edit process."</p>

Procedure	Overview
<p>Ensure Color Manage workflow consistency between the server and a remote client.</p> <p>Importing legacy (version 5.0 and below) workflows with a Color Manage node.</p>	<p>Workflows that include color management can become inconsistent between the Process Manager server and the remote client when profiles are uninstalled on the server.</p> <p>Color profiles are now managed in the Optimize node Color tab.</p> <p>If you import a legacy workflow with a Color Manage node into FreeFlow Process Manager, the legacy Color Manage icon is converted to an Optimize icon and the settings transfer automatically to the Optimize settings Color tab.</p> <p>For information, refer to the Ensuring Color Manager workflow consistency between the server and a remote client procedure.</p>
<p>Import ICC profiles</p> <p>ICC profile rights</p>	<p>Import any required ICC profiles.</p> <p>You must own the rights to use the ICC profiles accessed by FreeFlow Process Manager.</p> <p>For details, refer to the following procedure in the online help: “To import an ICC profile.”</p>
<p>Set up hot folders</p>	<p>You can open a common browse folder dialog and select or create a folder in the system via the Hot Folders dialog in Workflow Builder.</p> <p>You can:</p> <ul style="list-style-type: none"> <li>• Pause/resume all hot folders or individual hot folders.</li> <li>• Enable file clustering on a per hot folder basis.</li> </ul> <p>For details, refer to the following procedure in the online help: “Setting up a hot folder.”</p>
<p>Set up external processes</p>	<p>You may want to add external processes to support third party software, or to set up third party scripts.</p> <p>For details, refer to the following procedure in the online help: “Using third party external processes.”</p>
<p>Set up Preps</p>	<p>To use Preps, you will need to install it, configure the default Preps workflow, and create and save Preps job files.</p> <p>For details, refer to the following procedure in the online help: “Setting up Preps.”</p>

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