

# Xerox<sup>®</sup> ConnectKey<sup>®</sup> for SharePoint<sup>®</sup> Installation Guide



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## Contents

# Xerox<sup>®</sup> ConnectKey<sup>™</sup> for SharePoint<sup>®</sup> Installation Prerequisites

## Glossary of Terms

Term/Abbreviation	Description
AutoStore (AS)	ConnectKey for SharePoint is powered by AutoStore <sup>™</sup> imaging technology from Notable Solutions, Inc.
User	Refers to the administrative user who will run the installation and license the server.
Server	Refers to the Windows Operating System Based computer that ConnectKey for SharePoint is installed on. It does not necessarily refer to a server class computer.
Impersonation	Refers to the process of storing documents in SharePoint with the user name of the scanning user stored in the “modified by” column.
MFP (Multifunction Printer)	Any references to devices, multifunction devices, MFDs, printers, and MFPs should all be treated synonymously.

## Installation Prerequisites

### Hardware

- A Windows operating system computer with at least 2 GHz Processor is recommended
- Minimum 2 GB of RAM (4 GB or greater recommended)
- Minimum of 10 GB of (free and available) hard disk space
- Network Interface Card

## Software

The following Windows Operating Systems are supported:

- Windows 2008 Standard/Enterprise (32 bit only) – with the latest service pack
- Windows 2008 Standard/Enterprise R2 SP1 (64 bit)
- Windows 2012 Foundation/Essentials/Standard/Datacenter
- Windows 7 (32 bit)
- Windows 7 (64 bit)
- Windows 7 Professional (32 bit / 64 bit) SP1
- Windows 8 (32 bit)
- Windows 8 (64 bit)
- Windows 2003 (32 bit only) Standard\Enterprise – with the latest service pack
- Windows 2003 R2 (64 bit) Standard\Enterprise – with the latest service pack

Microsoft.Net Framework 3.51 SP1 and 4.0 are required.

To obtain .Net Framework 3.5.1 and 4.0 for Windows 7 Operating Systems please go to <http://www.microsoft.com>, click on Downloads, then click on Download Center, and search for .Net Framework 3.5.1., and .Net Framework 4.0. Download each of the packages, follow the installation instructions provided.

### Loading the .Net Framework Language Pack

The ConnectKey Process Designer will present the user with various system messages, including Microsoft .Net Errors. In order for system messages to appear in the correct language, the user will need to load the respective .Net Framework Language Pack.

For more information, please refer to the following site: <http://www.microsoft.com/en-us/download/details.aspx?id=23067>.

#### Note

The .Net Framework Language Pack is required regardless of the native language of the Operating System.

## Network Requirements

- Communication between all multifunction printers and the ConnectKey for SharePoint server should be validated in advance of the software installation with a ping test.
- A Microsoft Windows Network is required.
- Internet connectivity is required to download, update, and license your software.
  - If your ConnectKey for SharePoint server does not have internet access please contact Xerox Support for alternatives.
- Customer will be responsible to create domain service account (username and password) with local administration rights to be used to run the ConnectKey for SharePoint service on the ConnectKey for SharePoint server, with read/write access to any network drives and/or SharePoint 2007/2010/2013 destination locations that may be used for file output, and LDAP (Active Directory) query permissions.

- For non-domain accounts where files will be routed locally to the ConnectKey for SharePoint server, it is possible to use a local account. However, a domain account with read privileges is required to query the AD server when Authentication is used.
- ConnectKey for SharePoint is not supported in a Windows Distributed File System (DFS) environment.
- Windows Domains: Users, ConnectKey Server, MFDs, SharePoint servers, and network shares must all reside within the same domain for the following features to be supported:
  - Folder browsing
  - SharePoint browsing
  - Impersonation
  - Routing to My Sites
  - Enforcement of user permissions for scanning to folders
  - Scanning to network resources (folders or SharePoint Servers)

## SharePoint Requirements

- For the most robust functionality, it is strongly recommended that the ConnectKey Web Services extension be installed on the production SharePoint Server. This provides the most features when routing to SharePoint 2007 and SharePoint 2010. Please refer to the “Installing ConnectKey Web Service for SharePoint” section below for more details.
  - These options are also referred to as SharePoint 2007 (ConnectKey Web Services) and SharePoint 2010 (ConnectKey Web Services).
- It is possible to integrate with SharePoint 2010 and SharePoint 2013 without installing the ConnectKey Web Services on your SharePoint server. This configuration adds limitations when scanning to SharePoint 2010 and SharePoint 2013. Please refer to the “Installing ConnectKey Web Service for SharePoint” section below for more details on the limitations.
  - This option is also referred to as SharePoint 2010 (Microsoft Web Services) and SharePoint 2013 (Microsoft Web Services).

Please refer to the “Installing ConnectKey Web Services for SharePoint” section below for more information on the SharePoint connectors as well as requirements and limitations for each connector.

## Supported multifunction printers

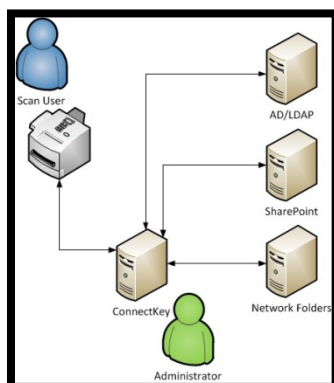
All multifunction printers must be Xerox EIP Capable printers. For exact models, please refer to the Compatible Products list found at:

<http://www.xerox.com/connectkeysharepoint>

## Other Considerations

- Antivirus software and firewalls must be configured not to auto-scan files on access or to block communication between the ConnectKey for SharePoint computer and the multifunction printers, SharePoint, network folders, active directory, LDAP, or email server. If antivirus software or firewalls are interfering with Xerox ConnectKey for SharePoint software and cannot be configured for compatibility with ConnectKey for SharePoint, they must be disabled.

- As a best practice, it is recommended that whenever possible, MS Windows service packs and updates should be applied after compatibility with ConnectKey for SharePoint has been confirmed.
- Xerox ConnectKey for SharePoint cannot be installed on a server that has an installation of AutoStore or Smart Document Travel.



**Deployment Architecture**

## Port Requirements

The following ports are identified for use in the Xerox ConnectKey for SharePoint solution. These ports are required to be open and available for the effective operation of the software solution. Even though it is possible to modify some of the services to operate on different ports, please consider these ports as necessary for any proposed deployments of the Xerox ConnectKey for SharePoint solution delivery.

Type	Port	Communication Type	Description
TCP	3241*	HTTP/HTTPS	Communication between multifunction printers and ConnectKey for SharePoint Server
FTP	3280*	FTP	Communication between multifunction printers and ConnectKey for SharePoint Server
TCP	80	SharePoint Default Port	Communication between ConnectKey for SharePoint Server and SharePoint
TCP	25*	SMTP Mail Relay	Communication between ConnectKey for SharePoint Server and SMTP Server
TCP	389	LDAP Query Port	Communication between ConnectKey for SharePoint Server and LDAP Server

\* Configurable



## Where to Obtain the Software and Documentation

Preparing to install Xerox ConnectKey for SharePoint begins by obtaining the software and associated documentation.

If you haven't already downloaded the software, please navigate to the following address to download the software:

<http://www.xerox.com/connectkeysharepointlicense>

1. If you don't already have an account, select the “[New User? Create Account](#)” link to Register.
2. After your account has been created, you will receive an email from [Xerox.ConnectKey@nsius.com](mailto:Xerox.ConnectKey@nsius.com). Please open the email and click on the activation link. You will be required to enter your email and password, and then click on “Login”.
3. After registering, select **Product Download**.
4. On the Downloads page, select the **Xerox ConnectKey for SharePoint** product and save the installation file.
5. In addition to downloading the software, download the following documentation:
  - *Xerox ConnectKey for SharePoint Administrator Guide*
  - *Xerox ConnectKey for SharePoint Quick Start User Guide*



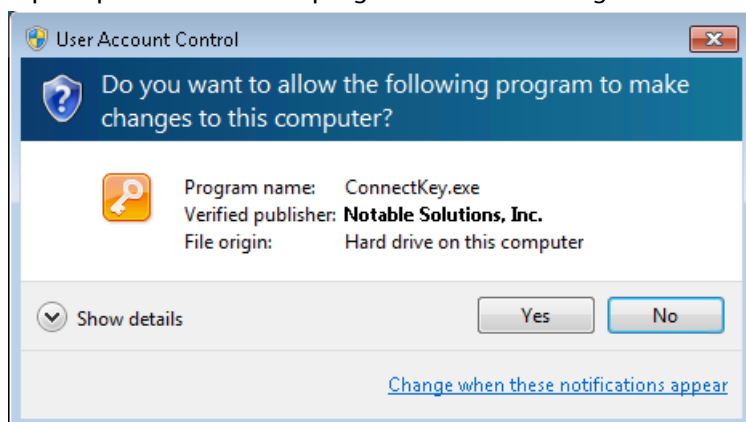
# Installing Xerox® ConnectKey™ for SharePoint®

1. Locate the software installation file and run it. Right-click and choose **Run as administrator** if you are installing on Windows 2008, Windows 2012, Windows 7, or Windows 8.

## Note

A restart may be required during or after the process.

If prompted to allow the program to make changes to the computer, click **Yes**.

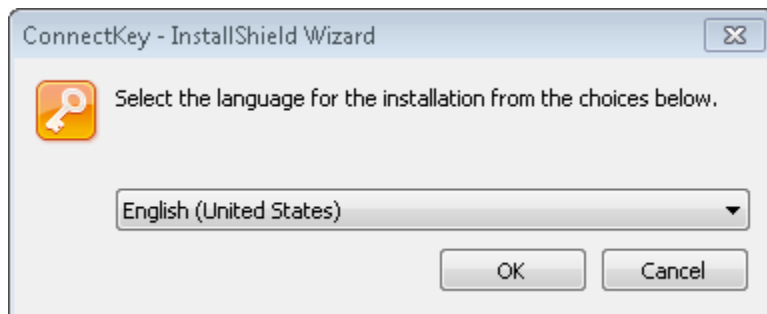


2. Upon installation start, a language selection screen will be presented.

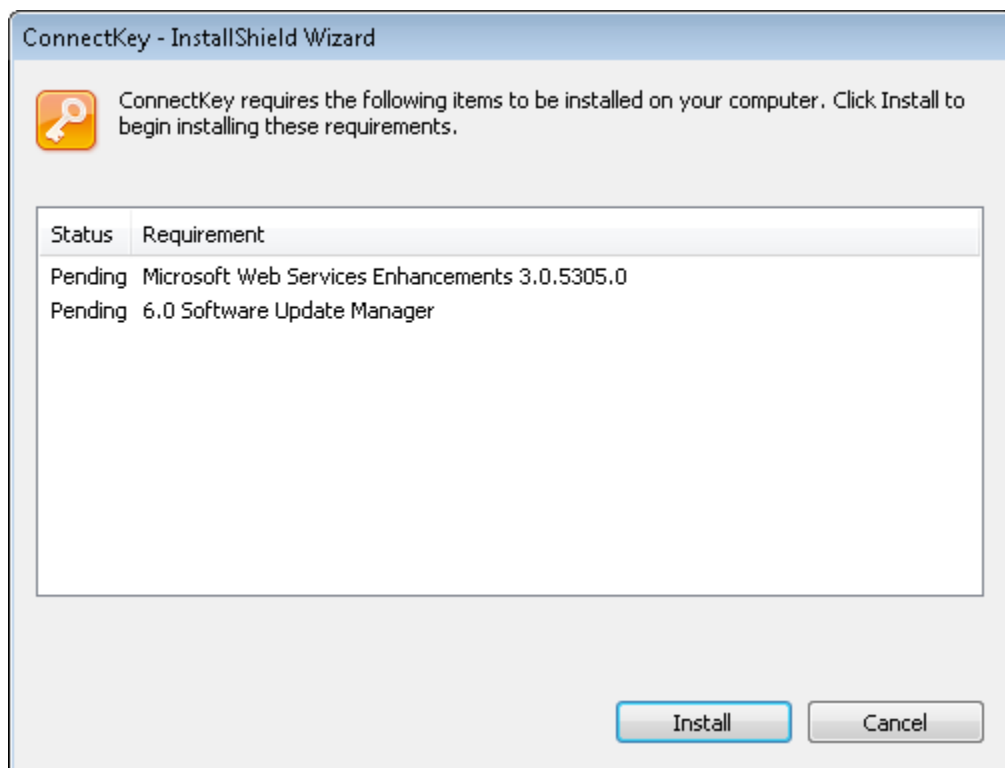
**Note**

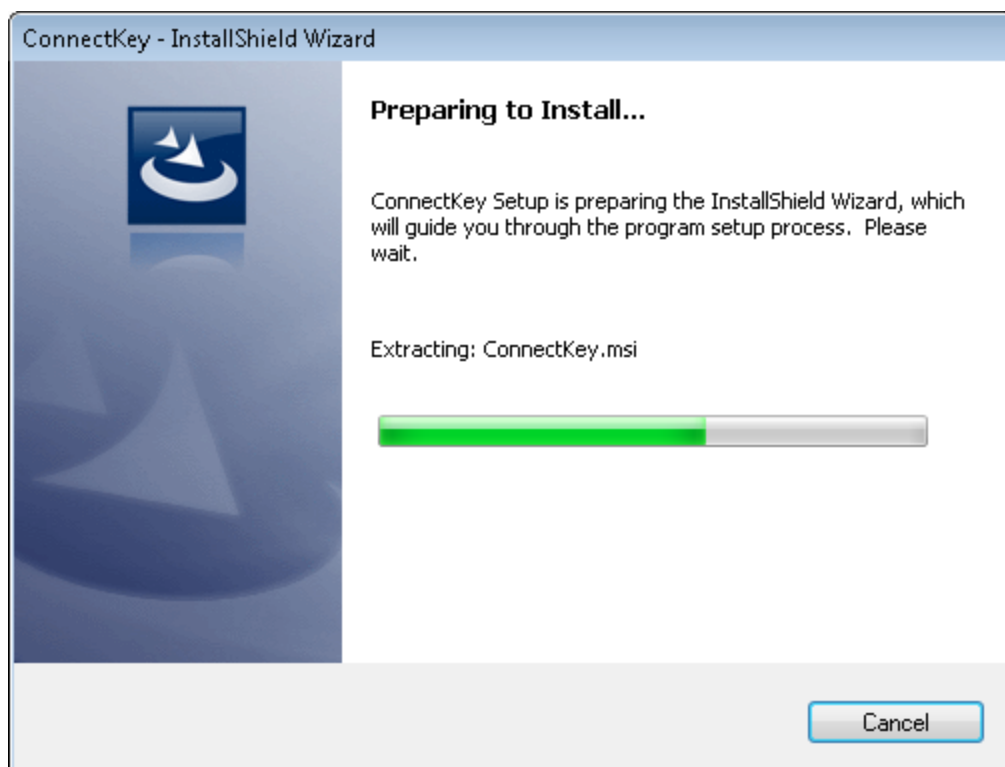
The choice made here will only affect the language of instructions presented during the installation process. During actual usage of the ConnectKey for SharePoint Application, text elements are displayed based on the language settings of the operating system

Once a language has been chosen, click **OK**.

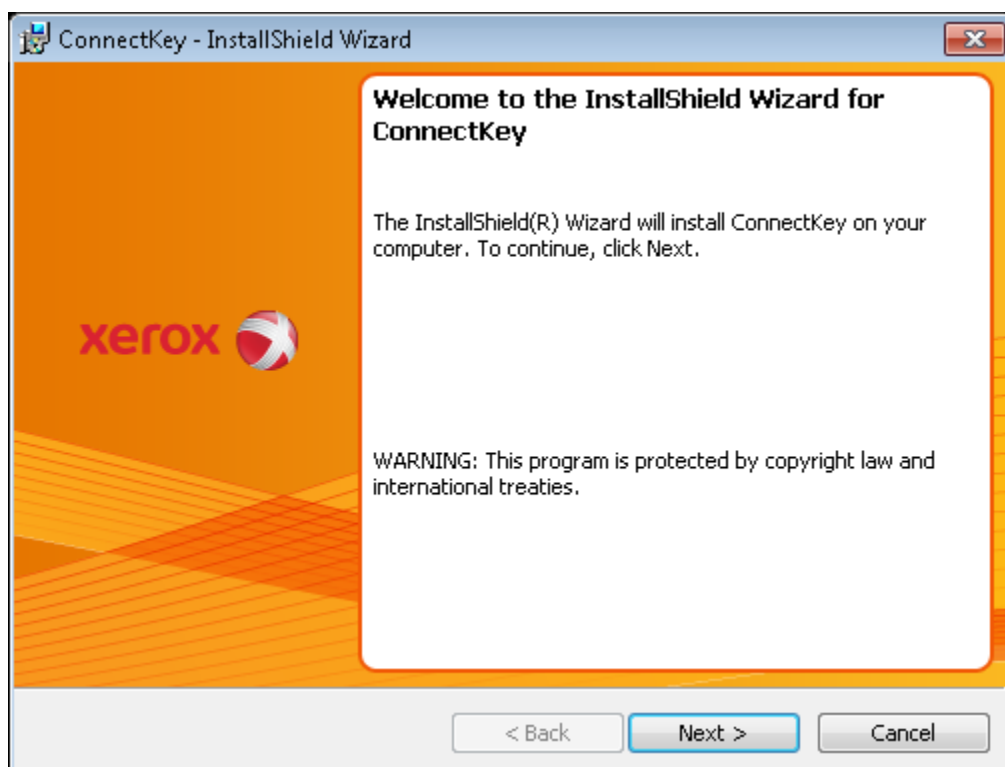


Click **Install** to begin installing prerequisites.

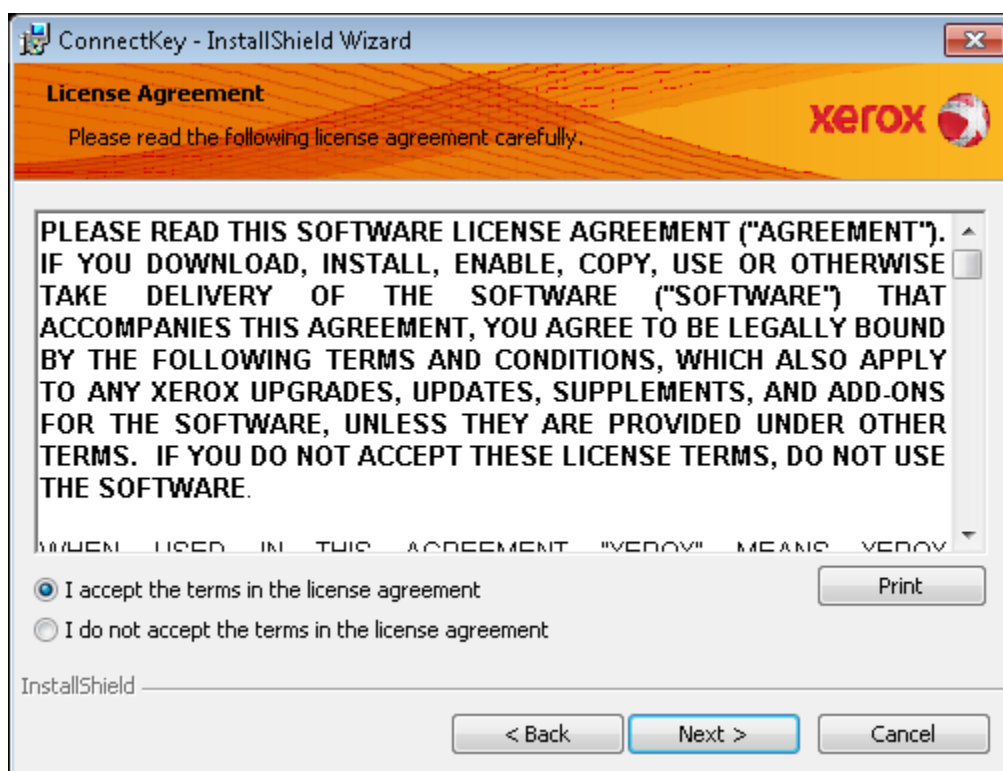




3. Once all prerequisites have been installed, the Xerox ConnectKey for SharePoint core installation begins.



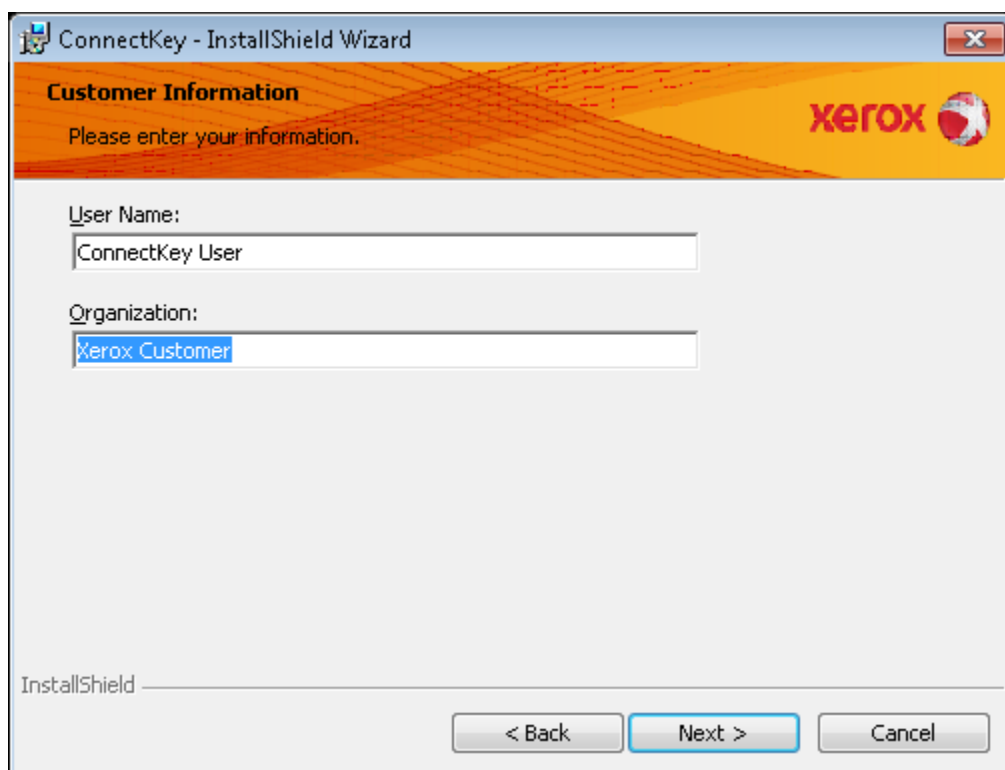
4. Accept the License Agreement terms.



**Note**

If you do not accept the terms in the License Agreement, the installation will not proceed.

5. Provide user and company information.



The image shows a Windows-style installation wizard window titled "ConnectKey - InstallShield Wizard". The window has a blue title bar with standard Windows controls (minimize, maximize, close). Below the title bar is a header area with an orange background and a Xerox logo on the right. The main content area is white and contains the following text and fields:

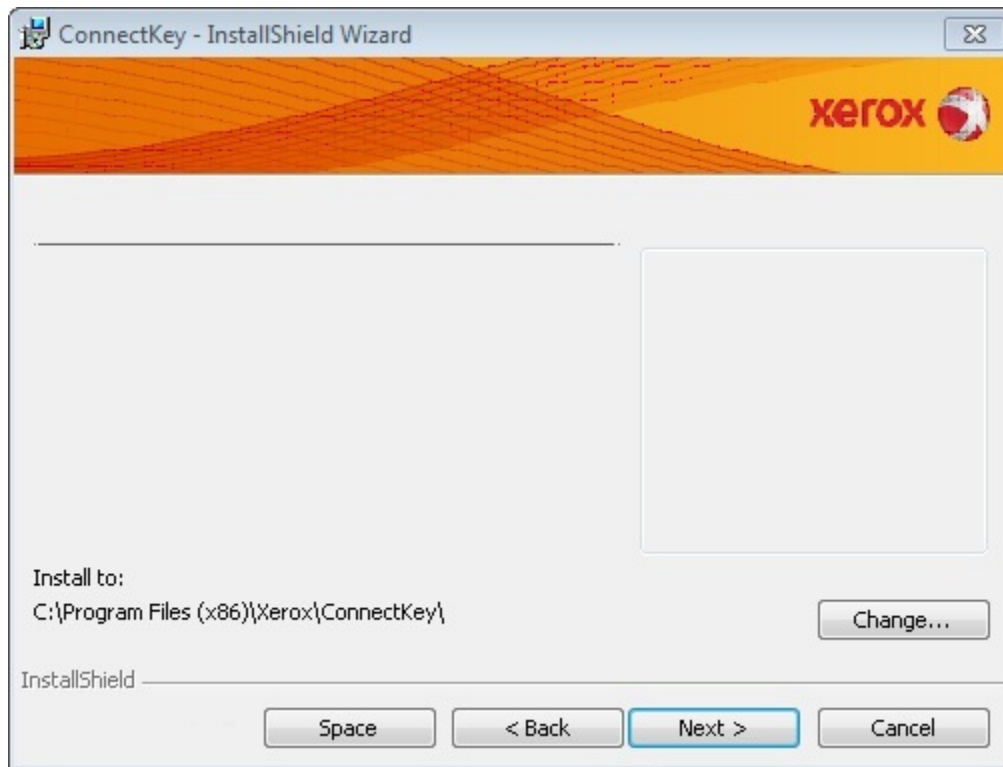
- Customer Information**
- Please enter your information.
- User Name:**  
A text input field containing "ConnectKey User".
- Organization:**  
A text input field containing "Xerox Customer".

At the bottom of the window, there is a status bar that says "InstallShield" and three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".

6. You may alter the default installation path by clicking **Change** or you may click **Next** to proceed with the default path.

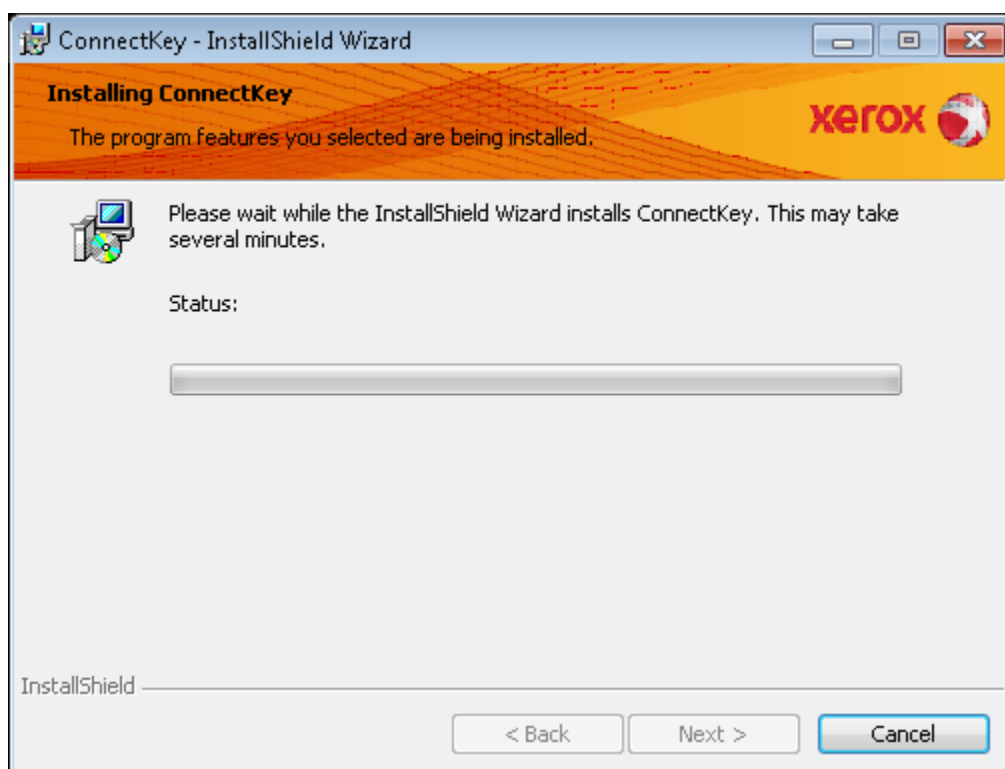
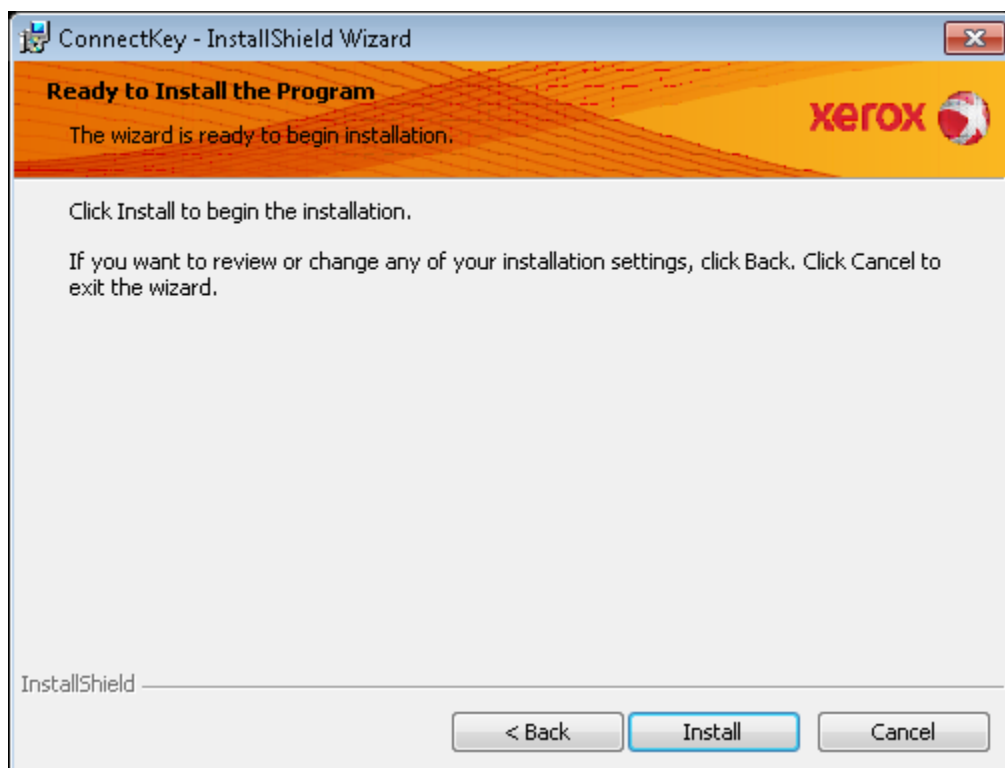
**Note**

Installation must be performed on a local drive. Installation to a Network drive is not supported.

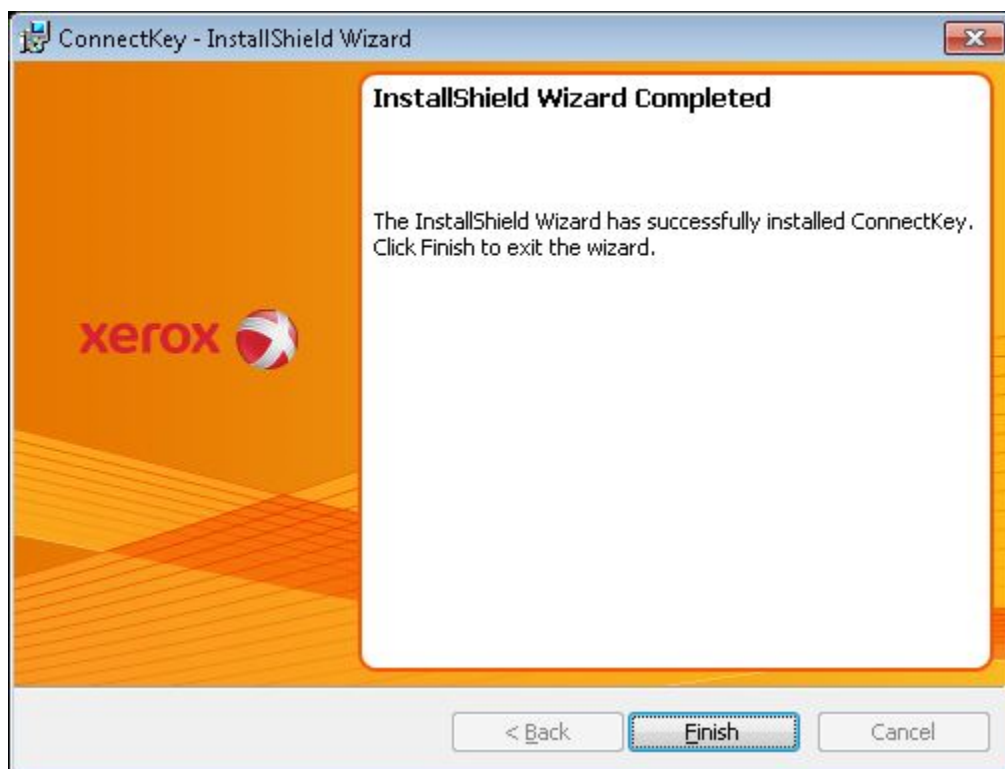




- Click **Install** to begin the installation.



The installer indicates when it has finished.



## Running ConnectKey Process Designer for the First Time

The first time the ConnectKey Process Designer runs, you will experience the following:

1. ConnectKey for SharePoint is in an unlicensed state. A dialogue displays the following message:  
**"The Xerox ConnectKey for SharePoint application does not have a valid license. Would you like to launch the license manager tool to begin the licensing process?"**

Click **Yes** to license your software.

Please refer to the "Licensing" section below for full details on how to License Xerox ConnectKey for SharePoint.

2. No serial numbers or Maintenance Contract IDs will be registered on a new install and the application will prompt you to enter one or more Xerox Serial Numbers and Maintenance Contract IDs. If you decline to enter any numbers, the prompt will remind you on each subsequent launch of ConnectKey for SharePoint until one or more serial numbers have been entered.

Please refer to the *Xerox ConnectKey for SharePoint Administrator Guide* or online help for more details on storing your Serial Number.

# Upgrading

# 3

This chapter explains how to upgrade your ConnectKey for SharePoint installation from a prior version by uninstalling the older version and reinstalling the newer version.

## Before you begin

Upgrading/Migrating ConnectKey for SharePoint requires a valid maintenance contract ID. If you do not have a valid maintenance contract, please do not proceed with this upgrade/migration; if you do your software will be disabled. Please contact your Xerox Reseller to purchase a new maintenance contract.

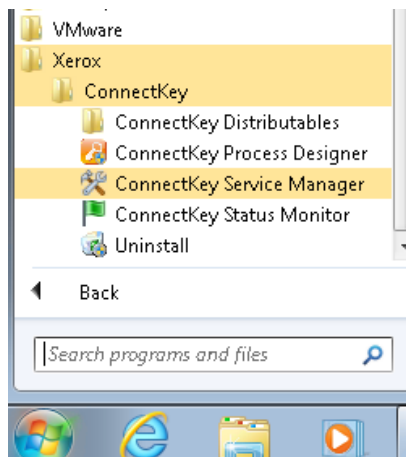
If your contract is current, please ensure that you have your maintenance contract ID ready in case you need to contact support for any installation issues. It is also recommended to have your serial number(s) available. Your Serial Number may be listed in the ConnectKey for SharePoint application under the “Serial Numbers” section if your administrator entered these during the installation process. Otherwise, please consult the letter obtained with your original purchase of Xerox ConnectKey for SharePoint.

## Removal of previous software

Before proceeding with installation of the new version, you must first uninstall your previous software via the “uninstall” application in the ConnectKey for SharePoint program group. As a best practice, it is recommended that you ensure your ConnectKey for SharePoint configuration files (CFG files) are backed up by saving your .cfg files to a repository. Additionally, as with all major changes to a production server, it is recommended that you backup your server if you have the means to do so. Some suggested methods are:

- Use Windows Server Backup Utility
- Create a Window System Restore Point
- Take a virtual machine snapshot
- Use 3<sup>rd</sup> party backup software

You can view which configuration file that you are currently using by selecting the Xerox>ConnectKey>ConnectKey Service Manager from Windows Start



After running the uninstall program, it may be necessary to manually delete the program group from the Start Menu. You can do this by right-clicking the item and deleting it.

## Installation of ConnectKey for SharePoint software

After removal of the previous version of the ConnectKey for SharePoint, run the installation program for the new version.

Please refer to

- Chapter 1, the section entitled “Where to Obtain the Software and Documentation” for information on where to download the software, and
- Chapter 2, “Installing ConnectKey for SharePoint” for installation instructions.

## Reinstalling ConnectKey Web Services

If you had previously installed the ConnectKey Web Service on your SharePoint Server, you should uninstall the Web Services installation using Windows Add/Remove Programs, then install the new version included with the new installation of ConnectKey for SharePoint software. Refer to the “Installing ConnectKey Web Service for SharePoint” section below.

## Licensing

Your existing licenses for ConnectKey for SharePoint will be recognized and accepted by the program. No changes are necessary to license your ConnectKey for SharePoint software.

To verify the status of your license, launch the Xerox ConnectKey for SharePoint License Manager. Refer to the “Licensing” section below for more information on Licensing ConnectKey for SharePoint.

## Loading your existing Configuration Files

Once installation is complete, you can use the ConnectKey for SharePoint Service Manager to load your existing CFG files. You should test to ensure that all workflows function correctly.

For more information on how to load your configuration files, please refer to section 2, “ConnectKey for SharePoint Configuration and Administration” of the *Xerox ConnectKey for SharePoint Administrator Guide*.



# Licensing

# 4

ConnectKey for SharePoint must be licensed in order to create configurations and run them. The licensing process requires the following sequence of events:

- Create a license request file using the License Manager in the ConnectKey Process Designer.
- Use the License Request File to complete the license registration process using the Xerox ConnectKey Web License portal. This process allows you to create your license key.
- Use the License Manager in ConnectKey Process Designer to load the license key that is generated from the Xerox ConnectKey Web License portal.

This process is also required to update your installation with additional MFP connections.

## Note

Licenses are machine specific. If you transfer the license to another machine, if you transfer your virtual machine between hosts, or if you rebuild a server you must contact support as the license is now invalid. Uninstalling and reinstalling the software on the same machine does not invalidate the license.

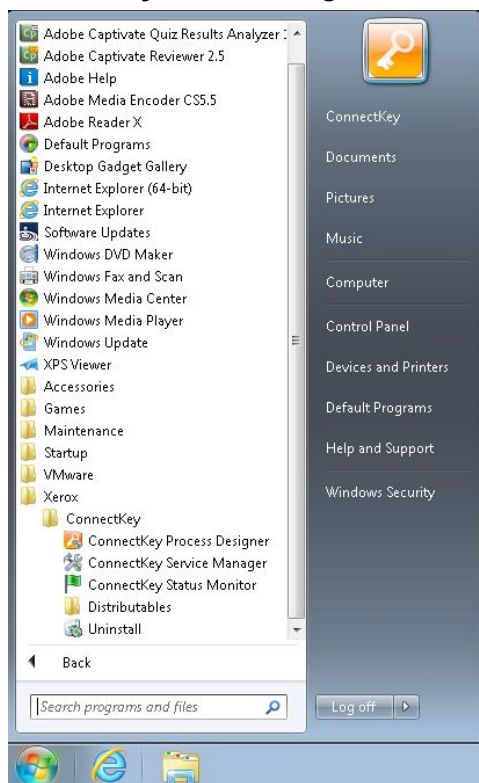
## Upgrading from a Trial License to a Production License

In order to upgrade from a trial license to a production license follow the same steps outlined below. You need to create a new **Request** (see step 4). Do not use the same Request file that you generated when you licensed your trial.

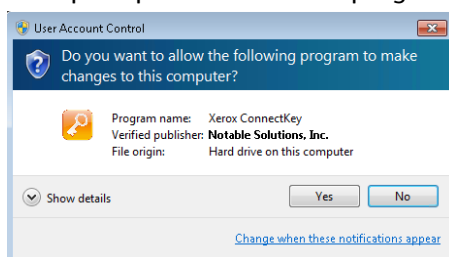
## Completing the licensing process

If you have already installed ConnectKey for SharePoint, follow the instructions below to begin the licensing process. Skip to step 4 if the License Manager window is already open.

1. Use the Windows **Start** icon to browse for the shortcut for the **Xerox** folder and look for the ConnectKey folder. Right-click **ConnectKey Process Designer** and choose **Run as administrator** if you are using Windows 2008, Windows 2012, Windows 7, or Windows 8. Otherwise, select **ConnectKey Process Designer** to launch the application.

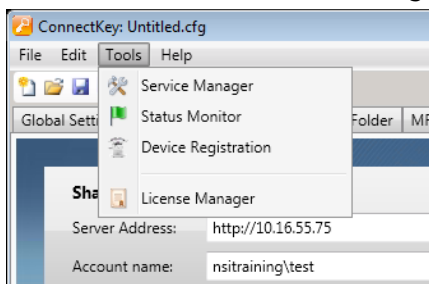


2. If prompted to allow the program to make changes to the computer, click **Yes**.

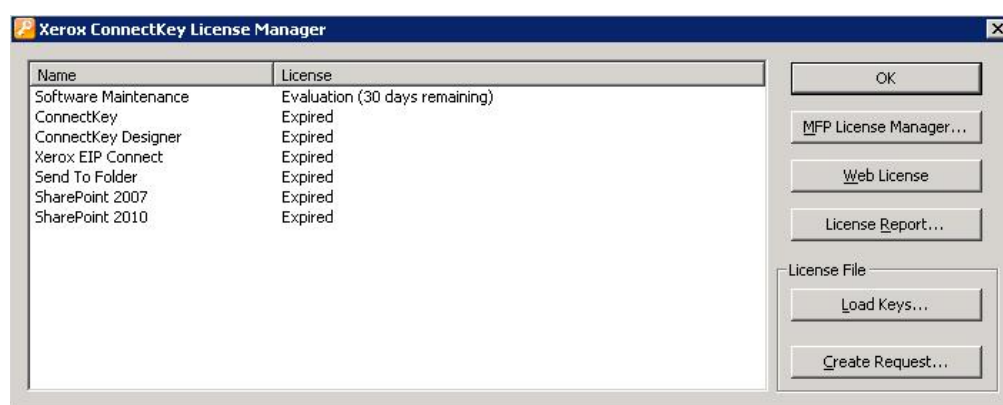




4. The ConnectKey Process Designer launches. Locate the License Manager option from the Tools menu and click **License Manager**.



The Xerox ConnectKey License Manager window displays. This is where you can view information about what components are licensed. Additionally, it is used to generate a license request file, to launch the Xerox ConnectKey Web License portal, and to load keys. It can also be used to generate a license report file which can be saved or printed.



5. Click **Create Request** to open the Save As dialog box. Navigate to a location on the server where you can easily find this file. You will need this file in step 6 during the web license registration. Provide any valid Windows file name and click **Save**. (Save as Type may be left blank.)
6. Click **Web License** in the License Manager. This launches your default web browser and loads it with the Xerox ConnectKey Web License portal.

#### Note

If the web page does not load, please check firewalls, proxies or other network security settings that may prohibit the browser from connecting to the Internet.

7. In the Xerox ConnectKey Web License portal enter your email and password and click **Login**.
8. In the Downloads page, click **Skip This Step** to skip downloading the software.
9. In the License Activation Page, select a License Type from the menu: **Production** or **30 Day Evaluation**. If you have purchased the product, select **Production**. If you are evaluating the product, select **30 Day Evaluation**.

10. Browse to the License Request file that you generated earlier (step 4) and upload it.
11. You can optionally choose to enter a Server Friendly Name, for easy recall of the name.
12. Enter your Xerox Serial Number and click **Submit**.
13. If requested, enter your INV number, and click **Add**. Repeat this step until you have entered all of your INV numbers. (Not all activations require INV Numbers. If the Welcome Letter that you received with your initial purchase did not contain an INV Number in addition to the Serial Number, then INV Numbers are not required in your situation.)
14. Click **Next**.
15. You are now presented with a summary of the product(s) you are about to license. Verify the printer count and click **Submit**.
16. Click **Download License** to download the license key file immediately. You will also receive a ConnectKey for SharePoint license key file via email.
17. Once you have your license key file, return to the License Manager to load the key file. Click **Load Keys** and browse to the location where you stored the license key file.
18. Click **OK** to close the License Manager.

Congratulations, you have now successfully installed and licensed your ConnectKey for SharePoint product. Next, you will begin the process of configuring it for scanning. If you will be scanning to a SharePoint server, proceed to the next chapter “Installing SharePoint Web Service.” Otherwise, skip that chapter and proceed to the chapter “Next Steps: Deploying ConnectKey for SharePoint.”

# Installing ConnectKey Web Service for SharePoint

Xerox ConnectKey for SharePoint has a supplemental web service add-on that must be used when routing to SharePoint 2007. It can optionally be used when routing to SharePoint 2010. Use of the add-on web service, referred to as ConnectKey Web Services, provides more robust functionality. If you do not intend to scan documents to SharePoint, you can skip this section.

## Connection methods that do not require ConnectKey Web Services

- **SharePoint 2010 (Microsoft Web Services)**

This connection method is used where the ConnectKey Web Services cannot be installed either due to corporate policy, or when the SharePoint Server is hosted by a 3<sup>rd</sup> party and will not allow installation of add-ons. The following limitations apply:

- File sizes are limited to 200 MB in size
- Impersonation is not supported – documents will be routed using the account credentials used to connect to SharePoint in the button configuration screen
- Support for managed metadata fields is not possible

- **SharePoint 2013 (Microsoft Web Services)**

This connection method is used where the ConnectKey Web Services cannot be installed either due to corporate policy, or when the SharePoint Server is hosted by a 3<sup>rd</sup> party and will not allow installation of add-ons. The following limitations apply:

- File sizes are limited to 200 MB in size
- Impersonation is not supported – documents will be routed using the account credentials used to connect to SharePoint in the button configuration screen
- Support for managed metadata fields is not possible

## Connection methods that require ConnectKey Web Services

The following SharePoint Connection Methods require the installation of the ConnectKey Web Service

- **SharePoint 2007 (ConnectKey Web Services)**
  - This method connects to a SharePoint 2007 server using the add-on web services provided with ConnectKey for SharePoint. This is the only method for connecting to SharePoint 2007
- **SharePoint 2010 (ConnectKey Web Services)**
  - This method connects to a SharePoint 2010 server using the add-on web services provided with ConnectKey for SharePoint. It provides the largest features set.

To enable the most functionality with the scan to SharePoint capabilities, it is recommended that you install the ConnectKey Web Services on your SharePoint server. The web service runs on your SharePoint server and provides ConnectKey for SharePoint with access to specific functions of the SharePoint server.

## Prerequisites

Before installing the ConnectKey Web Service, make sure that Xerox ConnectKey for SharePoint is properly installed and configured.

### Supported SharePoint Environments

2007 - Microsoft Office SharePoint Server (MOSS) and Windows SharePoint Services 3.0 (WSS)

2010 - Microsoft SharePoint Foundation and Microsoft SharePoint Server

## Installation Steps

There are two versions of the web service. One is for SharePoint 2007 and the other is for SharePoint 2010. Once ConnectKey for SharePoint has been installed, the default location of these ConnectKey Web Service installers will be C:\Program Files (x86)\XEROX\ConnectKey\Distributables. There will be subfolders for SharePoint 2007 and 2010.

1. Copy the appropriate installer file for your version of SharePoint to the SharePoint Server and run it with administrative privileges. Options available are:
  - SPS2007WebService.exe (for SharePoint 2007 32-bit Operating System)
  - SPS2007WebService\_64.exe (for SharePoint 2007 64-bit Operating System)
  - SharePoint2010WebService(64).exe (for SharePoint 2010 64-bit Operating System)
2. If the User Account Control dialog displays, click **Yes**.
3. Click **Next** to begin the installation.
4. Specify a SharePoint Application that the ConnectKey for SharePoint will access. In the SharePoint Site virtual directory bin folder window, click **Browse** to the right of the Destination folder field.
5. In the opened dialog, specify bin folder of the root directory for the IIS Virtual Directory of the desired SharePoint Application.  
 Typically, this value would point to C:\Inetpub\wwwroot\wss\VirtualDirectories\80\bin. By default, when you create a new SharePoint Application, the SharePoint Central Administration utility uses the port number that you have specified for the root directory.  
 For example, if you create a SharePoint Application under port number 12345, the root directory will be C:\Inetpub\wwwroot\wss\VirtualDirectories\12345.
6. Click **Next**.
7. After installation completes, a dialog window informs you about it. Click **Finish** to close the window.

### Note

In order to enable the capability to search your SharePoint server for ConnectKey for SharePoint scanned files or other scanned file-related information, such as metadata values, indexing must be enabled on your SharePoint server. For more information on how to enable indexing on your SharePoint Server 2007 or 2010, refer to the Microsoft SharePoint online Help.



# Next Steps: Deploying ConnectKey for SharePoint

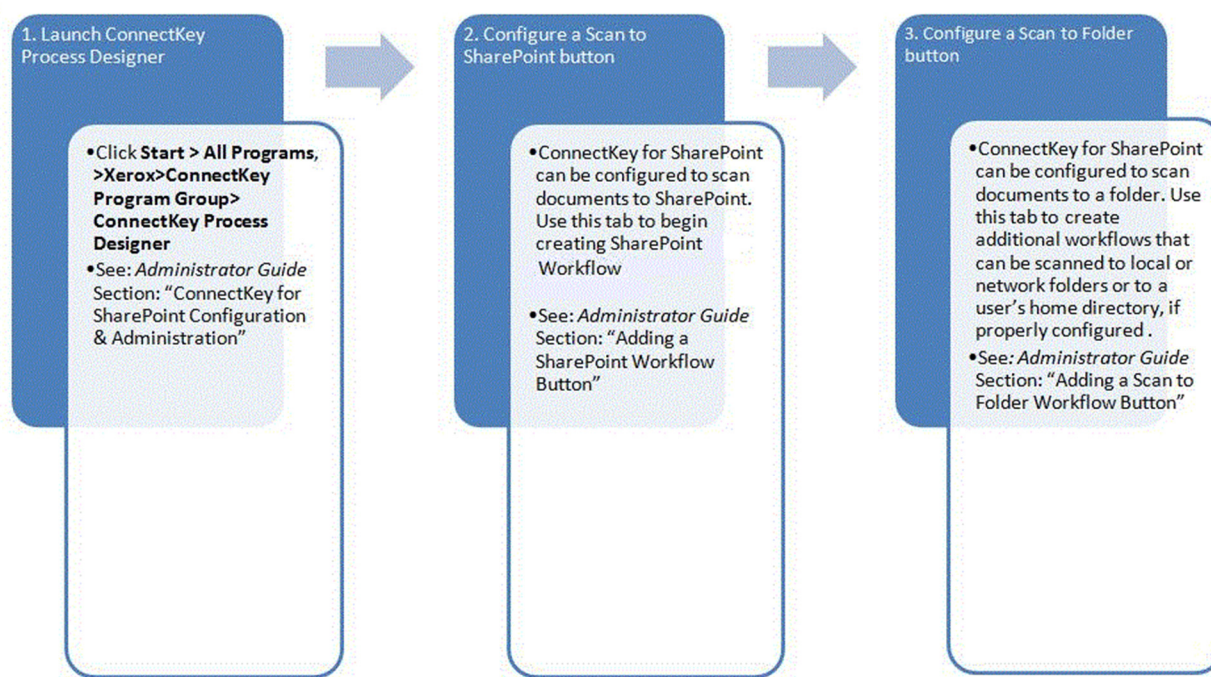
# 6

## Steps to a Successful Deployment

The ConnectKey Process Designer requires additional configuration before you can begin scanning. Completing each of the following steps, and referencing the associated documentation will help ensure a successful deployment of Xerox ConnectKey for SharePoint.

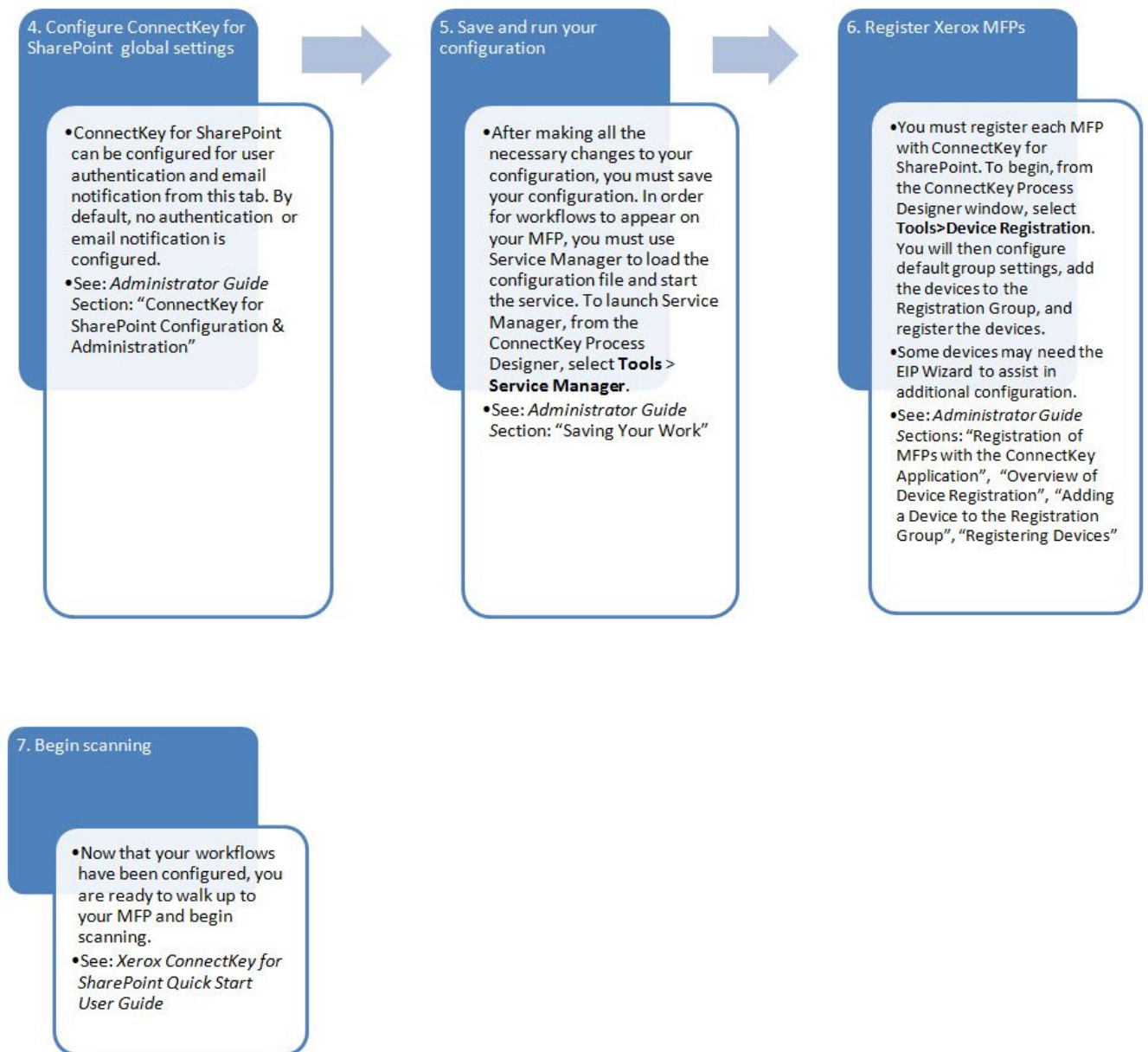
### Note

The *Xerox ConnectKey for SharePoint Administrator Guide* is referred to as the *Administration Guide*.





## Next Steps: Deploying ConnectKey for SharePoint





# Basic Troubleshooting

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The following are some general troubleshooting tips that should be checked before contacting Xerox Support. Additionally, there are log files at the following locations that can be referenced:

- C:\ProgramFiles (x86)\Xerox\ConnectKey\LOG

## Software will not download

The ConnectKey for SharePoint software can be downloaded from the Xerox ConnectKey Web License portal (<http://connectkey.weblicense.nsius.com/>) using a web browser. If this download fails, it may be due to one or more of the following factors:

- Proxy, antivirus, or firewall settings – Ensure that none of these is causing interference with the download
- Insufficient disk space – The download package and the associated temp files it produces during installation requires a minimum of 5 GB of space on the C:\ drive
- General network issues

## Software installation will not complete

If the ConnectKey for SharePoint installer fails to complete, it may be due to one or more of the following factors:

- Insufficient disk space – The download package and the associated temp files it produces during installation requires a minimum of 5 GB of space on the C:\ drive.
- Microsoft Prerequisites – If a MS Prerequisite is not properly installed, the ConnectKey for SharePoint installer will fail.
- Insufficient permissions – The installing user does not have local administrative rights to the server (on Windows 7 and Windows 2008, the user must right-click and “run as administrator” even if the user is a local admin.

## Licensing

Contact Xerox Support for any issues related to:

- Could not generate a license request file
- Did not receive or could not load the license key

### Note

When creating a user account in the Xerox ConnectKey Web License Portal you cannot use free mail such as Yahoo, Gmail, etc.

- License is invalid. Licenses are machine specific. If you transfer the license to another machine, if you transfer your virtual machine between hosts, or if you rebuild a server you must contact support as the license is invalid. Uninstalling and reinstalling the software on the same machine does not invalidate the license.

Contact your Xerox Sales Point of Contact for assistance with any issues related to:

- Incorrect number of multifunction printers are shown as licensed in the License Manager after loading the license key

## Where to go for help

If you experience a problem with the *Xerox ConnectKey for SharePoint* software application, support is available at the Knowledge Base. Navigate to <http://www.xerox.com/connectkeysharepointsupport>.

Otherwise, please call your local Customer Support Hotline or local Xerox partner. (You will be asked for your Serial Number as part of the validation process.) Contact information can be found by clicking on the support link at <http://www.xerox.com/connectkeysharepoint>. Look for “Support” on the left side of the product landing page.



