Xerox® FreeFlow® Core

Installation Guide

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Xerox® FreeFlow® Core Installation Guide

Prerequisites

This chapter contains:

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. At the top of the page, select **Owner Resources**, then select **Release Notes**, including full System Requirements.

Installing Xerox® FreeFlow® Core Software

This chapter contains:

FreeFlow® Core License

TRIAL LICENSE

You can install Xerox® 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 Xerox® 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.

- 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 all activation keys at the same time.

- 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 Xerox® FreeFlow® Core over the Internet. If the Xerox® FreeFlow® Core server does not have access to the Internet, obtain a license file using the Xerox Software Activation Portal (SWAP).

1. To obtain a license file, access the Xerox Software Activation Portal (SWAP) website at 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**.

    - To save the file to the local file system after you have redeemed all activation keys, select **Save and Download License File**.

5. To exit the Xerox Software Activation Portal (SWAP), close the Web browser.

OPTIONAL BACKUP LICENSE

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

> ⚠️ **Caution:** 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. Follow the instructions that are included with your Xerox® FreeFlow® Core backup Software License Enablement Kit.

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

Preparing for System Installation

1. To install Xerox® 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 whether your account is valid, before you proceed, contact Xerox Technical Customer Support.

2. Install all Windows updates except prerelease or preview updates. Prerelease and preview features are not supported.

3. Ensure that the operating system where you are installing Xerox® FreeFlow® Core is configured with a static IP address.

4. Install Microsoft SQL Server Standard or Express.

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

   - You can install Microsoft SQL Server Standard or Express manually on the local Xerox® FreeFlow® Core server or on a remote server. If you install SQL Server manually on the local server, ensure that you are logged in as the same local administrative user that operates the Xerox® FreeFlow® Core server. To install Microsoft SQL Server on a remote server, refer to the Microsoft SQL installation guide.

     When you install Microsoft SQL Server, refer to the following recommendations:

     – It is recommended that you use a named database instance.

     – It is recommended that you install the database instance with mixed-mode authentication.

     – The use of SQL authentication with the system administrator (sa) account is not recommended. However, this option is supported. If you use a custom database account, ensure that the account has system administrator privileges on the database instance. Refer to Database Permissions for Active Directory or Local Windows Users.

     – Installation of the database instance on a compressed Windows file system volume is not supported.

5. If Microsoft Office conversion is required, Microsoft Office is installed before or after FreeFlow Core.
   For supported versions of Microsoft Office, refer to the *Xerox® FreeFlow® Core Release Notes*. For more information, refer to Optional Installation Procedures.

Installing the Xerox® FreeFlow® Core Software

1. Double-click **XeroxFreeFlowCore-7.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 Xerox® FreeFlow® Core installation.

   b. Before you continue the installation, in the System Check log, search for the word `Error`, then resolve any problems. If you require assistance, contact Xerox Technical Customer Support.

   🖉 Note: When you install Xerox® 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 Xerox® FreeFlow® Core.

4. If you receive an onscreen prompt to restart, restart the server.

5. Restart the Xerox® FreeFlow® Core Installer.

6. Click **Next** in the Welcome window, then follow the onscreen instructions. The onscreen information depends on the state of your server.

7. Read and accept the terms of the license agreement in the License Agreement window. Click **Next**.

8. To install the application data on your largest hard drive partition, change the workflow data folder in the Destination Folder window. Click **Next**.

9. If you are using Microsoft Office file conversion or remote file shares for hot folders or output folders in the Service Account window, do one of the following:

   • Enter the name of the Windows account that runs the Xerox® FreeFlow® Core services.

   • 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 name of the user 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 Microsoft Message Queuing (MSMQ) automatically, using the Windows account credentials. To change the settings after installation, from the Windows Start menu, use the FreeFlow® Core Configure utility.

10. Enter the database administration information in the Database Information window. Click **Next**.

     a. For a database installed on the Xerox® FreeFlow® Core Server:

         • For a domain account, enter the name of the administrator in this format: `<domain>\<user-name>`. Enter the domain account password.

         • For a local account, enter the name of the administrator in one of the following two formats: `<host-name>\<user-name>` or `<user-name>`. Enter the local account password.

         • The Xerox® FreeFlow® Core installer differs from the Microsoft® SQL Server installer. In the Xerox® FreeFlow® Core installer, you enter the host name and instance ID in separate fields.

     b. For a remote database installed on a separate database server:

         • For a domain account, enter the name of the administrator in this format: `<domain>\<user-name>`. Enter the domain account password.

         • Local accounts are not supported when you use a remote database.

         • The Xerox® FreeFlow® Core installer differs from the Microsoft® SQL Server installer. The host name and instance ID are entered in separate fields.

         • Enter the name of the remote server 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.

11. Enter the new username and password created for the Xerox® FreeFlow® Core administrator in the Xerox® FreeFlow® Core Administrators window. Click **Next**.

12. 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:

- Xerox® 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 Xerox® FreeFlow® Core software licensing:

1. Login Xerox® FreeFlow® Core web interface as an administrator.

2. From Administration menu, select Xerox® FreeFlow® Core License.

3. Select a method of licensing.

    - To update the license from a DAT file(s), use Load License.

    - To browse a DAT file, select the folder icon.

    - If you have your License Enablement Kit, use Download License from Software Activation Portal. For more details, refer to Production License.

4. The dialog box gets closed after the successful license message appears.

Optional Installation Procedures

This chapter contains:

Windows Shared Folders or Microsoft Office Conversion Setup

For the latest office conversion enablement instructions, refer to *Xerox® FreeFlow® Core Release Notes*. To obtain the document, access the FreeFlow® Core webpage at https://xerox.com/automate. At the top of the page, select **Owner Resources**, then select **Release Notes**, including full System Requirements.

Post-Installation Procedures

This chapter contains:

Easy Start Workflows

To configure your server with predefined workflows, download the Xerox® FreeFlow® Core Easy Start Workflows. To obtain the Easy Start Workflows, access the FreeFlow® Core webpage at http://xerox.com/automate. At the top of the page, select **Owner Resources**, then select **Downloads**. For detailed descriptions of each workflow and product configuration requirements, refer to the *Xerox® FreeFlow® Core Easy Start Workflows Getting Started Guide*. You can download the guide from the Owner Resources section.

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/security/. Click and open the section for Workflow Software, then select **FreeFlow Core**.

Upgrades

For upgrade instructions, refer to the *Xerox® FreeFlow® Core Release Notes*. To obtain the Release Notes, access the Xerox® FreeFlow® Core webpage at https://xerox.com/automate. At the top of the page, select **Owner Resources**, then select **Release Notes**, including full System Requirements.

Upgrades

Database Permissions for Active Directory or Local Windows Users

This appendix contains:

This section describes the remote or local database permissions required for Active Directory (AD) or local Windows users.

When the user selects Windows authentication in the installer or FreeFlow Core Configure, the FreeFlow Core service account requires permissions to access the Microsoft SQL Server. If the FreeFlow service account does not have the necessary permissions, this section provides the steps required to assign the required permissions.

SQL Database Permissions Required for the FreeFlow Core Service Account

The SQL database permissions required for FreeFlow Core service account are as follows:

- During the installation of FreeFlow Core, the SQL Server login permissions are required for the FreeFlow Core service account and logged-in Windows user.

- During the installation of FreeFlow Core, the dbcreator server role is required for the FreeFlow Core service account and the logged-in Windows user.

- After the installation, db_owner user mapping is required in the SQL server.

  🖉 Note: The sysadmin server role is not required for the FreeFlow service account or the logged-in Windows user.

The following table specifies when manual configuration is required to set database permissions for Active Directory (AD) or local Windows users:

FREEFLOW CORE DATABASE AUTHENTICATION SPECIFIED IN FREEFLOW CORE INSTALLER OR FREEFLOW CORE CONFIGURE	STATUS OF SQL DATABASE USER	REQUIRED PROCEDURE
Windows Authentication	1 AD user does not have access to the remote SQL database. 2 Local Windows or AD user does not have access to the local SQL database.	Creating an SQL Login for a User and Assigning Permissions
Windows Authentication	AD or local Windows user has access to the SQL database, but does not have sufficient permissions to access the FreeFlow Core database, such as dbcreator or sysadmin permissions.	Assigning Permissions for Users with Existing SQL Logins
Windows Authentication	After the FreeFlow Core database is created during installation, the user is not mapped to the db_owner role for the database in the SQL server. User mapping is required before you restart the system after installation.	Mapping Users to the db_owner role for the FreeFlow Core Database
SQL Authentication	Not applicable	No manual configuration required

Creating an SQL Login for a User and Assigning Permissions

For Active Directory or local Windows users who do not have access to the SQL database, you need to create an SQL login. After you create the login, you need to assign the necessary permissions so that the user has access to the FreeFlow Core database.

🖉 Note: For the remote database connection, SQL server does not allow the user to create the local Windows user account.

1. Use the Microsoft SQL Server Management Studio to connect to the SQL server using an account with SQL server sysadmin privileges.

2. In the Object Explorer navigation pane, expand **Security**, then expand **Logins**.

3. Right-click **Logins**, then select **New Login…**.

   The Login - New dialog box appears.

4. In the left navigation pane, select the **General** page. In the Login name: field, provide the fully qualified user name, and select **Windows authentication**.

   🖉 Note: Ensure that the Active Directory account uses the fully qualified domain name, for example, <domain>\<user-name>. Ensure that the windows accounts include the machine name, for example, <system-name>\<user-name>.

5. In the left navigation pane, select the **Server Roles** page.

6. In the Server roles list, select the **dbcreator** or **sysadmin** check box, depending on the level of access required, then click **OK**.

   The SQL login is created for the AD or local Windows user with access to the dbcreator or sysadmin server role.

   🖉 Note: If you create SQL login with access to the dbcreator server role, after you install FreeFlow Core, perform user mapping. For more information, refer to Mapping Users to the db_owner role for the FreeFlow Core Database.

Assigning Permissions for Users with Existing SQL Logins

If a user has an SQL login, but does not have sufficient permissions to access the FreeFlow Core database, perform the following steps:

1. Log in to the SQL server with the Active Directory (AD) or SA account (SQL Account). To perform this procedure, sysadmin permissions are required.

2. In the Object Explorer navigation pane, expand **Security**, then expand **Logins**.

3. In the list of logins, verify whether the SQL login name is available for the Active Directory or local Windows user that you want to assign permissions to. If the SQL login name does not appear in the list, refer to Creating an SQL Login for a User and Assigning Permissions.

4. Right-click the SQL login name and select **Properties**.

    The Login Properties dialog box appears.

5. In the left navigation pane, select the **Server Roles** page. In the Server roles list, select the **dbcreator** or **sysadmin** check box, depending on the level of access required, then click **OK**.

    Note: If you create SQL login with access to the dbcreator server role, after you install FreeFlow Core, perform user mapping. For more information, refer to Mapping Users to the db_owner role for the FreeFlow Core Database.

Mapping Users to the db_owner role for the FreeFlow Core Database

To assign permissions to the created FreeFlow Core database, you need to map the users to the db_owner role for the database. After the FreeFlow Core installation is complete, perform the following steps:

1. Log in to the SQL server with the Active Directory (AD) or SA account (SQL Account). To perform this procedure, sysadmin permissions are required.

2. In the Object Explorer navigation pane, expand **Security**, then expand **Logins**.

3. Right-click the SQL login name and select **Properties**.

   The Login Properties dialog box appears.

4. In the left navigation pane, select the **User Mapping** page.

5. In the Users mapped to this login: section, select the name of the FreeFlow Core database. In the Database role Membership for: section, select the **db_owner** check box.
   FreeFlow Core databases have the prefix OAP.

6. For each FreeFlow Core database, repeat step 5.

7. Click **OK**.