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# Xerox<sup>®</sup> FreeFlow<sup>®</sup> 9.0 Makeready<sup>®</sup> Installation Guide





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# Introduction

The *FreeFlow Makeready Installation Guide* provides the information and procedures needed to perform the installation of a FreeFlow Makeready system.

For important information regarding system requirements and known issues and limitations for the current software release, refer to the Xerox® FreeFlow Makeready Release Notes. You can download the release notes from the All Support and Drivers section on [www.xerox.com](http://www.xerox.com).

# Makeready Software System Configuration and Installation

This chapter contains the procedures required to install and configure the FreeFlow software.

## Before You Begin

Your FreeFlow product is supported on platforms that meet or exceed the system requirements defined by Xerox in the FreeFlow Makeready Release Notes. For more information, visit the All Support and Drivers section on [www.xerox.com](http://www.xerox.com). The customer installs and configures an appropriately licensed version of the operating system on the server, then installs the software.

Before the installation of the FreeFlow software starts, the Installer checks the system prerequisites and displays any prerequisites that are required before the installation can continue.

**Note:** To obtain a license for the FreeFlow software, contact your Sales Representative or Authorized Reseller and supply the software Serial Number and the Hardware Address (MAC) number of the PC upon which the software will be installed. The license (.dat file) determines the options that are enabled during installation.

## Guidelines

Ensure that you follow these guidelines when you use the FreeFlow Installer application:

- To load the required software, follow the onscreen instructions.
- When you install third-party applications, always accept the default or typical installation settings.
- If an Open File-Security Warning dialog appears, run the file referenced.

# Prerequisite System Specifications

Before you install the FreeFlow software, ensure that the following third-party software is installed:

- Adobe Acrobat Pro

To install the Adobe Acrobat Pro software with the default or typical settings, refer to *Xerox® FreeFlow Makeready Release Notes* for the current supported versions.

To download the Makeready installer software visit the All Support & Drivers section on [www.xerox.com](http://www.xerox.com) [Customer Support/All Support & Drivers/Software & Platforms/FreeFlow].

If installation of the Copyright Management Service is required, configure the required IIS settings. For details, refer to the appropriate section in [Appendix B: Inspection](#).

**Note:** If you have not obtained a copy of the FreeFlow Makeready Copyright Management Services User Guide, download the document from the All Support and Drivers section on [www.xerox.com](http://www.xerox.com).

## FreeFlow Software Installation

To install the FreeFlow Makeready software, perform the following:

**Note:** Before you install the FreeFlow software, ensure that the platform meets or exceeds the minimum system requirements defined in the FreeFlow Makeready Release Notes.

1. Log in as the Administrator.
2. Enable .NET Framework 3.5.
  - a. Open the Start Menu, type **Control Panel**, then press **Enter**.
  - b. Select **Programs > Turn Windows Features on or off**.
  - c. Select **.NET Framework 3.5 includes .NET 2.0 and 3.0**, then select **OK**.
  - d. If prompted, select **Download files** from Windows Update.

**Note:** You must be connected to the Internet.
  - e. Select **Close**.
3. Ensure that you are logged in to the system as the Windows Administrator and that no other applications are running. If DPAdmin is the Administrator account, continue to use this account.
4. To run the FreeFlow Makeready installer, double-click the **Makeready-9.0.xx.x-MN.exe**, where xx.x is the version of the file. If prompted to confirm running the file, select **Run**.
5. The FreeFlow Makeready Installer application launches, then checks for prerequisites. If the installer detects that required applications are not installed on the system, it displays the applications in a list, or a warning appears.

**Note:** If all prerequisites are met, the Welcome screen appears. If a warning appears, before you continue, verify that all settings are configured properly.
6. Click **Next**. The FreeFlow Makeready Installer Welcome screen appears.
7. Click **Next**. The Licensing screen appears.

**Note:** To obtain a license for the FreeFlow software, contact your Sales Representative or Authorized Reseller and supply the software Serial Number and the Hardware Address (MAC) number of the PC upon which the software will be installed.
8. To upload the license .dat file, complete the following steps:
  - a. Click **Add license**.
  - b. Browse to the location of the .dat file, then click **Open**.
9. If installation of the Copyright Management Service (CMS) is required, this software requires the installation of Internet Information Services (IIS). Before the installation of the FreeFlow software, install and configure IIS. Refer to **Appendix B: Inspection**.
  - a. If required, select the check boxes for the Copyright Management Service applications needed. Choose from the following list of options:
    - **CMS Server with Client license required**
    - **CMS Client Only**
    - **None**
  - b. If you select CMS Client Only, enter the IP Address of the CMS Server.

**Note:** If the IP Address of the CMS Server is not known, enter 127.0.0.1.
10. Click **Next**.
11. Proceed accordingly:
  - If the Copyright Management Service screen appears, proceed to step 11.
  - If the Destination screen appears, continue with step 13.

12. At the Copyright Management Service screen, enter the following information:
  - CAUTION:** Ensure that the account password information is entered on the Copyright Management Service screen. The installer uses this information to configure the underlying MSDE database during the installation. Once the system is installed, you cannot change this information unless you reinstall the FreeFlow software.
  - CMS Database Administrator Password.
    - Note:** A complex password is required. Do not enter special characters.
  - Proxy server IP Address or URL with port number, if required.
    - Note:** Enter the IP Address and port number in the following format:  
`IPAddress:PortNumber` or `ProxyServerName:PortNumber`.
    - Note:** If the proxy server settings are not known, leave them blank. If needed, you can change the proxy server information later from the CMS configuration screen.
  - Proxy Server account username, if required.
  - Proxy Server user password, if required.
13. Click **Next**. The Destination screen appears.
14. Click **Next**. The Ready to Install screen appears.
15. Review the list of options to install. If a required option is not listed, click **Back**, then make required configuration changes.
16. Click **Install**.
17. When the Installation completes, a FreeFlow Installation Completed Successfully dialog or warning appears.
18. Read the dialog, then click **Finish**. If a warning appears, resolve the issue listed.
19. Read the dialog, then click **OK**. The system automatically shuts down, then restarts.
20. When the system is ready, to complete the installation process, ensure that you log in as the current Administrator. If DPAdmin is the Administrator account, continue to use this account.

## Copyright Management Service Account Configuration

Complete this section only if the optional Copyright Management Service (CMS) was installed. If you have not yet obtained a copy of the *FreeFlow Makeready Copyright Management Services User Guide*, download the document from the All Support and Drivers section on [www.xerox.com](http://www.xerox.com).

**Note:** The customer is responsible for signing up for an account with the Copyright Clearance Center (CCC) prior to the installation of the Copyright Management Service. You can access the CCC website at [www.copyright.com](http://www.copyright.com).

Completion of the following procedures requires the CCC account information. If this information is not available, skip this procedure and continue with the steps in **Register Production Printers**. The Copyright Management Service can be configured after the user has registered for an account with the CCC. If the CCC account information is not available, the customer can configure CMS later.

1. Launch Internet Explorer.
2. In the Explorer Address bar, enter:  
`https://localhost:8090/CMS/CMSAdmin.aspx`, then press **Enter**. The CMS Administration page appears.
3. Click the **Configuration** link.
4. In the Section Names menu, select **CMS Configuration**.
5. In the Key Value column, enter the following customer CMS database user account information:
  - Username
  - Password
6. To test the connection, click **Test Configuration**.
7. To save the information, click the **Update** link.
8. Close all open screens.
9. For new installations, proceed to **Register Production Printers**.

## Register Production Printers

For the list of supported Xerox production printers and Controllers, refer to the *FreeFlow Printer Support Guide*. You can download this document from the All Support and Drivers section on [www.xerox.com](http://www.xerox.com).

To set up production printers, complete the following steps:

**Note:** The following steps represent a generic procedure that is designed to facilitate the installation of a typical production printer.

1. To start the application, select **Start>All Apps>Xerox>FreeFlow>Printer Registration**.
2. The Printer Registration application launches, and the Installed Products dialog appears.  
**Note:** If a Windows Security Alert dialog appears, to enable all features of the program, click **Unblock**. If the User Account Control dialog appears, click **Continue**.
3. From the list of installed products, clear all the check boxes except for Makeready.  
**Note:** To turn off the display of the Installed Products window, you can select **Do not show this dialog again when launching application**. To set the software to display the Installed Products window, from Printer Registration, select **Options>Install Products**.
4. To close the dialog, click **OK**. The Printer Registration screen appears.
5. At the bottom of the screen, click **Add**. The Add Printer Wizard screen appears.
6. In the Printer Name or IP Address text box, type the IP Address or host name of the print server as it is known on the network.
7. Proceed accordingly:
  - For automatic detection of the printer model and controller or server type, click **Identify Configuration**. After the printer is identified, proceed to step 9.
  - To enter the printer information manually, continue with step 8.

8. From the Printer model drop-down list box, select the appropriate printer.
9. Ensure that the appropriate controller or server is selected in the **Controller/Server type** menu.
10. If you are installing a printer that supports the High Security feature, and want to configure the feature, ensure that the **High Security** check box is selected.  
**Note:** If the printer is not set up for High Security and High Security is selected, printing is disabled.
11. Click **Next**, then proceed accordingly:
  - If the printer supports automatic registration, an Automatic Printer Registration screen appears. Proceed to step 12.
  - If the printer does not support automatic registration, a screen appears prompting for queue information. Proceed to step 13.
12. At the Automatic Printer Registration screen, make the appropriate selection:
  - To register all the print queues automatically, select the check box for **Automatically register all queues at printer**, then click **Next**. Proceed to step 13.
  - To register only specific print queues, leave the Automatically register all queues at printer check box blank and click **Next**. A screen appears prompting for queue information. Proceed to step 14.
13. At the print queue information screen, make the following selections:
  - a. Select the print queue from the menu, or manually enter the queue name.  
**Note:** If High Security is selected and the printer is not set up for High Security, printing is disabled.
  - b. Enter a descriptive custom name for the printer and queue combination.
  - c. Click **Next**, then proceed to step 14.
14. Select the printer/queue pairs that you want to register, then click **Next**. The FreeFlow printer settings screen appears.
15. At the FreeFlow printer settings screen, complete the following steps to finish configuration of the printer:
  - a. Select the required Print Path and Job Handling options.
  - b. If the screen indicates an FTP username and password box, enter the appropriate information. Some printers do not use this method and the FTP login boxes are grayed out.
  - c. Click **Finish**. The printer is registered.
16. To configure additional printers, repeat steps 5-15.
17. To close the Printer Registration application, select **File>Exit**.

# Post-Installation Procedure

This section contains additional post-installation procedures to ensure a fully functional FreeFlow system.

This chapter includes:

- Adding Licensed Features After Installation
- Test the Print Paths
- Install a Xerox® DocuMate Scanner
- Ensure that the System is Backed Up

## Adding Licensed Features After Installation

**Note:** If the installation of optional software is required, perform the procedures in this section.

The License Manager is used to enable additional licensed features after the installation of the FreeFlow software. All licensed components are installed during the installation of FreeFlow but require a valid license to function. To obtain the required licensing information, contact your Xerox Sales Representative or Agent.

You can install the following optional software:

- Set Labeling
- Copyright Management Service.



**Note:** Copyright Management Service and Set Labeling are typically enabled during the installation of FreeFlow software. Other features are displayed in the license tool, however only the software previously listed is valid for the installed configuration.

1. To run the FreeFlow License Tool application, complete the following steps:
  - a. From the Windows Start menu, select **Run**. The Run window appears.
  - b. In the Open drop-down text box, enter `FreeFlow installation drive>\freeflow\licensetool.exe`, then click **OK**. The License Manager screen appears.
2. Click **Next**. A Warning dialog appears.
3. To dismiss the dialog, click **OK**.
4. Complete the following steps to upload a license .dat file:
  - a. Click **Add license**.
  - b. Browse to the location of the updated .dat file and open it.

**Note:** Loading a license from a .dat file does not remove existing FreeFlow licenses, it only appends or updates existing license information.
5. To follow the onscreen instructions to complete the licensing change, click **OK**.

When the system is ready, log in and verify that the required features are enabled.

## Test the Print Paths

Use this section to test print paths for all installed printers.

### Test the Printers

To test the available print paths, complete the following steps:

1. From the Windows Taskbar, select **Start>All Apps>Xerox FreeFlow>File Manager**.  
The File Manager application opens.

2. Under All Folders, double-click the icon and browse to the FreeFlow installation folder (install drive:\Xerox\FreeFlow).
3. To test the production print path, complete the following steps:
  - a. In the details portion of the FreeFlow folder, locate and select the file PpTest.rdo.
  - b. From the menu bar, choose **File>Print**. When the Print dialog appears, click **OK**. Another Print dialog appears.
  - c. Ensure that **Production Print** is selected, then click **OK**. The Job Setup screen appears.  
**Note:** If a Windows Security Alert dialog appears, to allow use of all program features, click **Unblock**. If the User Account Control dialog appears, click **Continue**.  
**Note:** If you are submitting the file to a printer using TCP/IP and the FTP User account designated when registering the printer has not been created on the print server, a dialog box appears that prompts you to enter a username and password for the print server.
  - d. Ensure that the required printer is selected, then click **Submit All**. A status dialog displays the percentage of completion.  
**Note:** If a Windows Security Alert dialog appears, to allow use of all program features, click **Unblock**. If the User Account Control dialog appears, click **Continue**.
  - e. Verify the document printed at the production printer.
4. To test the PostScript print path, complete the following steps:
  - a. In the \FreeFlow directory, select PsTest.rdo.
  - b. From the menu bar, choose **File>Print**. When the Print dialog appears, click **OK**. Another Print dialog appears.
  - c. Ensure **Production Print** is selected, then click **OK**. The Job Setup screen appears.
  - d. Ensure that the required printer is selected, then click **Submit All**. A status dialog appears showing the percentage of completion.
  - e. Verify the document printed at the production printer.
5. Close the FreeFlow File Manager application.

## Install a Xerox® DocuMate Scanner

This section contains the procedures for installing a Xerox DocuMate scanner, TWAIN 1.9 or later. Refer to the *Xerox® FreeFlow Makeready Release Notes* for the current supported scanners. You can download this document from the All Support and Drivers section on [www.xerox.com](http://www.xerox.com).

1. Using a USB cable, connect the scanner to the FreeFlow Makeready system.
2. Download the appropriate DocuMate driver for your scanner. You can find the certified TWAIN and WIA drivers, along with additional installation and configuration guides, at: <http://www.xeroxscanners.com/en/us/support/DriversAndManuals.asp>.
3. Install the DocuMate Scanner Driver.
4. Ensure that the DocuMate Scanner is powered on and running. If the scanner is not powered on and running, the drivers do not install correctly.
5. Reboot the Makeready system.
6. Launch the Makeready application.
7. Select **File>Insert>Scan>Images**.

The DocuMate Scanner dialog opens successfully.

## Ensure that the System is Backed Up

**CAUTION:** It is the responsibility of the customer to back up the FreeFlow system after the installation completes.

Perform a complete backup of the local system to use for purposes of disaster recovery.

**CAUTION:** Perform a complete backup of any external storage devices, such as RAIDs, and so on. If a system failure or a data corruption occurs, failure to complete these procedures can result in an unrecoverable system.

# Appendices

This section includes the following information:

- Appendix A: Managing FreeFlow Software After the Installation
- Appendix B: Inspection

# Appendix A: Managing FreeFlow Software After the Installation

## Installing Patches and Service Packs

You can update the FreeFlow software periodically using Service Packs and SPAR patches. Install patches on an as needed basis only to solve a specific issue. Service Packs are approved for all installations. Install the Service Packs to keep the system current.

**Note:** The following instructions are generic. Service Pack and Patch instructions are provided with each software update. Always follow the instructions provided when installing the Service Pack or Patch.

To install a FreeFlow patch, complete the following steps:

1. Download the latest Makeready software from the Support and Drivers section on Xerox.com. The FreeFlow Makeready software has a full installer, which you can use for new installations or for patching.
2. Double-click Makeready-9.0.xx.xx.MN.exe, then follow the steps on screen.
3. When the installation completes, open the FreeFlow application and verify that the patch revision is listed on the splash screen.

## Post-upgrade Confirmation and Configuration Procedures

### Verify the Registered Printer List

To verify that the registered production printer list was retained, complete the following steps:

1. From the Windows Taskbar, select **Start>Programs>Xerox FreeFlow>Printer Administration>Printer Registration**. The Printer Registration application launches, and the Installed Products dialog appears.
2. From the list of installed products, clear all the check boxes except for Makeready.
3. Click **OK** to close the dialog. The Printer Registration screen updates and displays the same list of registered printers.
4. Verify that the list of registered printers is populated with the printer list that was present on the previous system.
5. Close the Printer Registration application.

## Reinstalling FreeFlow Software

If required, to reinstall the FreeFlow software, complete the following procedure:

**Note:** This procedure assumes that all FreeFlow software has been uninstalled using the Windows Add or Remove Programs utility.

1. To run the FreeFlow Makeready installer, double-click the Makeready-9.0.xx.xx- MN.exe. If prompted to run the file, select **Run**.
2. Click **Next**. The Licensing screen appears.
3. If required, edit the license or add a license from a .dat file.

**Note:** It is not required to add or edit the license for a basic reinstallation. The Installer detects the existing license.

**CAUTION:** In the next step, you are instructed to navigate through the Installer screens. Unless you are required change the password, if the password text box contains asterisks for existing accounts, do not enter a password.

4. Navigate through the remaining screens and accept the default values. Only enter a system password if the password text box is empty. If asterisks are present, the installer has detected an existing password for the account.
5. After the reinstallation process is complete and the system restarts, ensure that the system is operating normally.

# Uninstalling FreeFlow Software

To uninstall the FreeFlow software completely when a complete uninstall is required, follow and complete these procedures:

**Note:** Completing this procedure does not remove licensing information and other Xerox program information stored in the C:\Program Files\Xerox folder.

There are two Common Printer applications: The Common Printer Status Tool and FreeFlow Printer Registration. These applications are installed as part of the FreeFlow application bundle but must be removed separately.

1. From the Windows Taskbar, select **Start>Control Panel**.
2. Select **Programs and Features**. The Uninstall or change a program window appears.
3. Locate the **Common Printer Status Tool** application, then click **Uninstall**.  
The application is uninstalled.

**Note:** If a User Account Control dialog appears, click **Continue**.

4. Locate the **FreeFlow Printer Registration** application and click **Uninstall**. The application is uninstalled.

**Note:** If a User Account Control dialog appears, click **Continue**.

**Note:** Uninstalling Printer Registration does not remove the list of registered printers. This list is maintained in c:\Windows\System32.

5. From the list of programs, select **FreeFlow Makeready**.
6. Click **Uninstall**. An Installer screen appears.

**Note:** If a User Account Control dialog appears, click Continue. Click **Next**, then proceed accordingly:

- If an Add or Remove Programs dialog appears, proceed to step 11.
- If a database removal screen appears, continue with step 8.

**CAUTION:** The next step uninstalls the Copyright Management Database. Before you proceed, ensure that the uninstall is required. In some situations, it is desirable to leave the database applications intact.

7. To uninstall the Copyright Management Database, select the check box.
8. Click **Next**. A warning dialog appears.
9. To confirm the database removal, click **Yes**. An Add or Remove Programs dialog appears.
10. Click **Yes**. The software is uninstalled. A Remove Completed Successfully screen appears.
11. Click **Finish**. The system shuts down, then restarts.

# Appendix B: Inspection

The required system settings for Makeready are listed as follows. Ensure that the FreeFlow settings are configured, as applicable, before you begin the installation of the FreeFlow software.

## System Settings

The following are the required system settings for the FreeFlow software:

**Note:** To enable and configure the recommended security settings, refer to the *Xerox FreeFlow Security Document*. You can download this document from the Xerox Security website at [Information Security - Xerox](#).

### Disable Hyper-threading in the PC BIOS

If this option exists, disable hyper-threading in the PC BIOS. Consult your IT Department for more information, if necessary.

### Verify the Memory (RAM)

1. Ensure that you are logged in to the Operating System as an administrative user.
2. Right-click **Start**, then select **System**.
3. Verify the amount of Installed Memory (RAM) meets or exceeds minimum specifications listed in the *FreeFlow Makeready Release Notes* and exit System screen.

### Disable User Account Control

1. In the control panel, click **User Accounts** twice, then select **Change User Account Control Settings**.
2. To confirm the new settings, slide the bar to **Never Notify**, then select **OK**. If the message Do you want to allow the following program to make changes to this computer? appears, select **Yes**, then from the left pane, select **Control Panel Home**.

**Note:** Some customers do not allow user account control to be disabled or Never Notify to be selected. Verify this setting with the customer. If required, after the installation of FreeFlow completes, enable the setting again.



## Verify the Necessary OS Components

If installation of the Copyright Management Service is required, configure the required IIS settings.

**Note:** Ensure that you have access to the Microsoft Windows installation disk.

**Note:** In the following section, do not remove or disable any of the customer applications. Only add the following applications, if needed.

1. From the control panel, select **Programs**. Select **Programs and Features**. Select **Turn Windows features on or off**.
2. Expand the Windows Features window.
3. Expand **Internet Information Services**, then expand the **FTP Server**. Verify that the following is active:
  - FTP Service
4. Expand **Web Management Tools** and verify that the following are active:
  - Expand **IIS 6 Management Compatibility**
    - IIS 6 Management Console
    - IIS 6 Scripting Tools
    - IIS 6 WMI Compatibility
    - IIS Metabase and IIS 6 configuration compatibility
  - IIS Management Console
5. Expand **World Wide Web Services** and verify that the following are active:
  - Expand **Application Development**
    - .NET Extensibility 3.5
    - ASP
    - ASP.NET 3.5
    - ISAPI Extensions
    - ISAPI Filters
    - Server Side Includes
  - Expand **Common HTTP Features**
    - Default Document
    - Directory Browsing
    - HTTP Errors
    - Static Content
  - Expand **Health and Diagnostics**
    - HTTP Logging
    - Request Monitor
  - Expand **Performance Features**
    - Static Content Compression

- Expand **Security**
  - Basic Authentication
  - Request Filtering
  - Windows Authentication
- 6. Verify that the Microsoft .NET Framework 3.5 is active, which is indicated by a shaded box.
- 7. To ensure that the necessary components are installed, click **OK**.
- 8. Select **Restart Now**.