

# Xerox® Workplace Cloud

## Getting Started

Thank you for choosing Xerox. This document includes information on creating a Xerox Workplace Cloud account and Xerox Workplace Cloud Client for Windows and for Mac OS.

### Configuration Options

When installing and setting up Xerox® Workplace Cloud (WC) for your environment, the first thing that must be decided is whether an Agent will be installed in your network. The Xerox Workplace Cloud Agent is a software service that can be installed on one or more PCs that are connected to your network. Typically, the Agent is running inside of your company firewall.

The presence of a print Agent enables discovery of printers, which helps with central management of your devices. The Agent also helps to route print jobs from the server to your local printers. Some features, such as printer authentication (e.g. using cards), and printing to non-Xerox devices and queues, requires the Agent software to be installed inside your company firewall. Installing the print Agent enables all features of Xerox® Workplace Cloud based on license you are using. For this full experience, follow the instructions in the next section.

An alternative to installing and using a print Agent is available to those users that have the latest generation of Xerox® ConnectKey® AltaLink and VersaLink devices. With these devices, the administrator has the option to use Xerox® Workplace Cloud without the need to install the Agent software on site. This option allows users to use the Xerox® Workplace App or email workflow with job release from any Xerox® ConnectKey®, AltaLink and VersaLink MFPs.

**Note:** For more details on what configuration is appropriate for your work environment, refer to *Xerox® Workplace Cloud Administrator Guide*.

### Create a Company Account

1. Open a web browser and go to <https://xwc.services.xerox.com>.
2. Click Create Company Account.
3. Type the email address that you will use to administer this company account and click **Submit**. You will be sent a temporary password by email.
4. Go to your email inbox, copy the password from the email, and paste it in the **Temporary** field in Xerox Workplace Cloud.
5. Fill in the **Password** and **Repeat** fields with a new password, and then click **Submit**.
6. Provide the required company information and click **Submit**.

7. Read and accept the License Agreement. The Workplace Cloud Administration main screen displays.

**Note:** Once an account is created, you enter trial mode. Trial mode allows you to use Xerox® Workplace Cloud for 30 days or 30 print jobs, whichever is reached first.

8. If you plan on installing an Agent, then from the Administration main screen, click Step 1 of 2: Install the Xerox® Workplace Cloud Agent. Follow the instructions and click Agent Wizard.

A site will be created automatically.

9. Return to the Administration main screen, click Step 2 of 2: Enable One or More Printers. Click the printers tab link and select Enable from the Actions menu to enable printers.

## Setup Xerox® Workplace Cloud Client for Windows

The Xerox Workplace Cloud Client is a Windows PC based component of the Xerox Workplace Cloud solution that enables desktop print workflows through the native File > Print path of a computer's operating system. The Xerox Workplace Cloud Client can be downloaded from the Xerox Workplace Cloud Web Portal or deployed in bulk via SCCM.

### Administrator Installation

No user credentials will be stored within the administrator installation package. When the administrator downloads this to any given computer, once the installer completes, the user will be required to login to the Workplace Cloud Client. The Workplace Cloud Client will reach back to the Cloud and download the default drivers from the user's company account.

1. Open a web browser and go to <https://xwc.services.xerox.com>.
2. Navigate to Account > Setting > Desktop Printing, select the Desktop Client tab.
3. Click on the **Xerox Workplace Cloud Client** link to download the Client without administrator access.

The client installation can then be distributed to end users (e.g. email, shared file location or deployment via SCCM).

### User Installation

The user installation package changes dynamically based on what the user selects on the Print tab in the Xerox Workplace Cloud web portal. There are several options that can be initiated from the Print > Workstation tab by an end user:

- Adding the Workplace Cloud Client (this must be done first if not already installed on the user's workstation)
  1. Open a web browser and go to <https://xwc.services.xerox.com>
  2. Navigate to Print and choose Desktop
  3. Click on the **"Workplace Cloud Client"** download link.
  4. Run the executable and follow the onscreen instructions to complete the installation.
- Adding the Generic Printer

- Adding a Custom Generic Printer (Custom Driver Printer)
- Adding Direct Printers

The user must have the Xerox Workplace Cloud Client installed on their workstation first, prior to attempting to download or use any of the last 3 options to install a specific printer.

### **Adding the Xerox Generic Printer (Follow Print)**

1. Open a web browser and go to <https://xwc.services.xerox.com>.
2. Navigate to Print and choose Desktop.
3. Click on the **Generic Printer** download link.

**Note:** when the user selects the Generic Printer download link, the printer reference file will be downloaded with an extension supported by Xerox Workplace Cloud. The file extension is .xwcdp. Once the user clicks on the file, the already running XPC service on the Workplace Cloud Client will read the file and perform the driver download and installation. Once the installation process is completed, the user will see a printer created on their workstation named [print@printbyxerox.com](mailto:print@printbyxerox.com).

### **Adding Custom Driver Printers (Follow Print)**

1. Open a web browser and go to <https://xwc.services.xerox.com>.
2. Navigate to Print and choose Desktop.
3. Click on one of the pre-loaded customer generic printers under 'Adding the Custom Driver Printers (Follow Print)' to download the Customer Driver Printer.

**Note:** when the user selects the Custom Driver Printer download link, the printer reference file will be downloaded with an extension supported by Xerox Workplace Cloud. The file extension is .xwcdp. Once the user clicks on the file, the already running XPC service on the Workplace Cloud Client will read the file and perform the driver download and installation.

### **Direct Printer**

1. Open a web browser and go to <https://xwc.services.xerox.com>.
2. Navigate to Print and choose Desktop.
3. Choose from one of the two tabs, All Printers and Favorite Printers.
4. Click on a printer from the All Printers or Favorite Printers to download the printer definition file.

**Note:** The file extension is .xwcdp. Once the user clicks on the file, the already running XPC service on the Workplace Cloud Client will read the file and perform the driver download and installation.

**Bundle a Custom Driver** The custom Driver upload feature in the Xerox Workplace Cloud requires both the 32-bit (x86) and 64-bit (x64) versions of a v3 driver to your desktop. Follow the steps below to bundle a Custom Driver for use with the Xerox Workplace Cloud Client.

1. Navigate into the directory where the 32-bit (x86) driver package is

installed. This should contain all of the files for the driver including the .ini file. For example:

C:\Users\<user>\Desktop\Pullprint\_5.617.7.0\_PCL6\_x86\Pullprint\_5.617.7.0\_PCL6\_x86\_Driver.inf

2. Select all the files and right mouse click to copy all files.
3. Paste copied files to a zip file. For example, PullPrint32.zip. **Note:** do not zip up a folder containing the files, it will not work correctly.
4. Repeat the same procedure for the 64-bit (x64) driver.
5. Copy the two zipped files to the same location, select both of the files and choose to zip them into a zipped file. For example, PullPrint.zip.

## Setup Xerox® Workplace Cloud Client for Mac OS

The Xerox Workplace Cloud Client for Mac OS is a Mac OS based component of the Xerox Workplace Cloud solution that enables desktop print workflows through the native File > Print path of a Mac machine. The Xerox Workplace Cloud Client for Mac OS can be downloaded from the Xerox Workplace Cloud Web Portal.

User can experience the new WC Client for Mac by logging in to the Xerox Workplace Cloud web portal via a supported Mac browser on a Mac machine.

- For Cloud Administrator – Account > Settings > Desktop Printing > Desktop Client, click Mac link.
- For Cloud User – Print > Desktop, click Mac link.

Mac users can now use the WC Client for Mac OS with WC supported authentication methods:

- Xerox Workplace Cloud Authentication
- LDAP Authentication
- Azure AD Authentication
- OKTA Authentication

### **Supported Mac Browsers:**

- Safari
- Google Chrome
- Firefox

### **Supported Mac OS:**

- Mac OS 10.14 (Mojave)
- Mac OS 10.13 (High Sierra)
- Mac OS 10.12 (Sierra)

WC administrators and users can download the Xerox Workplace Cloud Client for Mac OS as a non-executable installation package with the .XWCDP extension, and

install the package onto a Macintosh computer.

**Note:** Once installed, the Mac Client is operated from the Macintosh status bar.

To download and run the Mac Client installation package:

1. Log in to the Xerox Workplace Cloud webpage (<https://xwc.services.xerox.com>).
2. Select **Print > Desktop**.
3. To download the installation package to your browser default download location, in the Install the Workplace Client section, click **Mac**.  
The **XeroxWorkplaceCloudClient.pkg** file downloads automatically to your browser default download location.
4. To run the installer, locate the file and click it.  
The Xerox Workplace Cloud Client Installer window appears.
5. To continue the installation process, click **Continue**.  
The ReadMe window appears, displaying additional information about the Mac Client.  
**Note:** To print the ReadMe, click **Print**, or to save the ReadMe as a .txt file, click **Save**.
6. To continue the installation, click **Continue**.  
The Software License Agreement window appears.
7. Read the license terms. To accept the terms and continue the installation, click **Continue**, then click **Agree**.  
The Destination Select window appears, and the default installation location is displayed.  
**Note:** To change the location of the installation, click **Change Install Location**, then select the required destination.
8. To continue the installation process, click **Install**.  
A security dialog box appears.
9. To begin the installation, enter the Macintosh administrator password, then click **Install Software**.  
A status progress bar appears.  
**Note:** It can take several minutes for the installation to complete.
10. When the installation finishes successfully, a message appears confirming that the installation was successful. To finish the installation and exit the installer, Click **Close**.  
A dialog box appears asking if you want to keep the installer file or move it to the Trash.
11. To keep the installation package in the current location, click **Keep**, or to move the file to the Trask, click **Move to Trash**.  
The Xerox Workplace Client for Mac OS is installed and ready to use.

### **Adding Custom Driver Printers (Follow Print)**

1. Open a web browser and go to <https://xwc.services.xerox.com>.
2. Navigate to Print and choose Desktop.
3. Click on one of the pre-loaded customer generic printers under 'Adding the Custom Driver Printers (Follow Print)' to download the Customer Driver Printer.

**Note:**

- Cloud administrators and users will have the options to download and install Mac ONLY or Mac and Windows custom driver printers.
- When the user selects the Custom Driver Printer download link, the

printer reference file will be downloaded with an extension supported by Xerox Workplace Cloud. The file extension is .xwcdp.

## Optional Xerox® Workplace Cloud Settings

The Xerox® Workplace Cloud installs with default settings selected, but you can change the following settings to your preferences:

- Define who can use your printers (**Account > Policies > Access Controls**)
- Restrict printing to 2-sided and/or black and white. Select **Account > Policies > Print Controls**.
- Identify server-based print queues to be used with accounting packages.
- Enable Xerox® Standard Accounting, Xerox® Network Accounting, or Server-based Accounting. Select **Account > Accounting**.
- Enable a different authentication mechanism for users in your Company. Select **Account > Company Profile > Company Authentication Type**. Supported mechanisms include:
  - Workplace Cloud
  - LDAP
  - Azure AD
  - OKTA
- Require a passcode for job retrieval on Xerox® Secure Print capable printers. Select **Printers > Edit Printer > Secure Print Capable**.
- Enable printer authentication to set how users can access the console on the device. Select **Printers > Actions > Authentication Mode**.
- Install the @PrintByXerox app on Xerox® EIP-enabled multifunction printers to enable pull-print workflows.
- Enable Content Delivery Network (CDN) will configure the system to utilize the Akamai Content Delivery Network to improve print performance at print job release time. To enable this, select **Account > Settings > Performance**. Select **Enable CDN** configuration value.
- Xerox Workplace App (Print Portal) allows user to submit print jobs through mobile devices, on both iOS and Android platform. Go to Google Play Store or Apple store. Type 'Xerox Print Portal' in the search bar and install the Xerox Workplace App.
  - Once download completed, sign in with your Xerox Workplace Cloud account credentials.
- The Custom Drivers provide the ability to use specific print drivers for the Workplace Cloud enabled devices. Custom drivers may be assigned to specific printers for direct print submission via the desktop client as well as support the ability to upload jobs and release them later at a compatible printer. Please see **Bundle a Custom Driver** section above for detailed step-by-step instructions on creating a Custom Driver.
- **Local Print Optimization** improves the performance of desktop print jobs that are submitted to a custom generic printer for later release. To enable this, select **Account > Settings > Desktop**

**Printing.** Choose one of the three settings for **Local Print Optimization**:

- Disabled
  - Enabled without Cloud Backup
  - Enabled with Cloud Backup
- **Service Pathway Options for Convenience Authentication** provides Cloud administrator the flexibility of locking out the entire device user interface, locking no services, or allowing the device itself to manage the locked services. To enable this, select **Account > Policies > Printer Authentication > Machine Access section**. Choose one of the two settings for **Machine Access**:
    - **Manage Machine Access at the Device** – Xerox Workplace Cloud will not modify the machine access settings, the WC will not push the blocking screen settings to the target device. If a user attempts to access @PrintByXerox EIP app, the user would be required to login to the EIP app with pre-set WC authentication method.
    - **Manage Machine Access using Print Management** – WC will manage machine access for devices.
      - **Service Pathway Enabled** – The WC will push the blocking settings to the target device. The device's local user interface will be blocked with a blocking screen. Since the user has been authenticated already, the system will not ask for credentials while accessing @PrintByXerox EIP app.
      - **Service Pathway Disabled** – The WC will push the blocking settings to the target device, but will not block the device User Interface (no blocking screen).
  - **Print Quota Rules** provide the capability to restrict the number of pages a user can print within the time period defined by the Cloud account administrator. The Cloud account administrators will be able to control the cost of printing within their company by applying quotas to user groups and specific users.

**There are two account level configuration options which drive Print Quota behavior:**

**Configuration: Account > Policies > Rules > Print Quotas**

**Quota Period** – Designates the time interval that will be utilized to calculate Remaining and Consumed pages for Print Quotas

- a. Daily
- b. Weekly
- c. Monthly

**Pages Per Job Estimation** – number of pages used in instances where jobs cannot be parsed to determine the number of pages.

**Note:** the default setting of 3 pages is configurable by the Cloud account administrators from 1 – 999 pages.

**There are two ways to apply Print Quotas to users:**

- Using a **Print Quota Rule** from **Account > Policies > Rules > Print Quotas**

**Note:**

- a. This will only be applied to the User Groups.
  - b. If a user has multiple Print Quotas Rules assigned to them, the most restrictive quota will be enforced.
- Using the **Override Print Quota Rules** function in the Edit User Details page via **Users > Edit User > Details**.

**Note:**

The override Print Quota Rules function will take precedence over any Print Quota Rules applied to the user.

The Cloud account administrator can view the **Enforced Quota** on any specific user, they can access the **Analyze Print Quota** action menu item in the Users tab. **Note:** only one user can be analyzed at a time.

For more detailed Print Quota configuration and information, please see the Xerox Workplace Cloud Administrator guide.

**Note:** Provide your Company Code to your mobile users so that they can identify their user accounts with this company account. Select **Account > Company Profile**.



## Support

### **Documentation**

Workplace Cloud Documentation in PDF format are available for viewing or downloading from:  
<https://www.support.xerox.com/support/xerox-workplace-cloud/documentation/enus.html>

### **Knowledge Base**

<https://www.support.xerox.com/support/xerox-workplace-cloud/support/enus.html>

### **Support Forum**

Users may also ask questions of their peers on the Customer Support Forum at:

<https://forum.support.xerox.com/t5/Xerox-Workplace-Suite-Workplace/bd-p/Cloud>

Xerox moderators will monitor the forum and provide information and answer questions as needed.