

VERSION 5.8
MAY 2024
702P09298

Xerox[®] Workplace Suite Minor Upgrade Guide

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Upgrade Guide Overview

The Minor Upgrade Guide is designed for Xerox Workplace Suite upgrades when you are using the same configuration. If you are planning to change your configuration, for example, the SQL Authentication method please refer to the *Xerox Workplace Suite Major Upgrade Guide*.

What is New in Xerox® Workplace Suite

New Features in Version 5.8

- The Mobile and desktop application and IOS/macOS URI links on the Azure AD connection page **Native Application** tab have been updated.
- The Workplace Suite Forum link has changed to: [Workplace Suite - Customer Support Forum](#).
- The Workplace Suite Announcements link has changed to: [Workplace Suite Announcements - Customer Support Forum](#).
- A new setting called **Confirmation Number Generation After Expiration** has been added under **Enable Confirmation Number Expiration** option in the **Company > Policies > Security > General** tab, which controls when a User will get a new confirmation number generated, after it expires.
- A new section called **Printing to Alternate IP Address** has been added to the **Printers > Edit Printers > Details** tab, this setting allows print jobs to be released to a alternate IP address which can be a Fiery® or another printer.
- A new feature called **Queue Association** has been added to designate which print queue will be used to perform job processing.
- A new authentication method called as **Group Managed Service Account** has been added for SQL access where the Windows operating system manages the password for the account instead of relying on the administrator to manage the password.

New Features in Version 5.7.200

- A new User Role called **Power User** has been added. This role has access privileges more than a **General User**, but not as such of an **Administrator**. The primary feature of the role is to allow users to access all tabs except the **Company** and **Settings** tab.
- New Xerox® Workplace Suite Prerequisite software that supports the Xerox® VersaLink® B625 and C625 Multifunctional Printers.
- The Dashboard **Modify Cost** setting allows you to enter values up to four decimal places.
- **Print Quota** allows you to select **Yearly** option as a quota period to set the allocated Print Quota to start on the first day of the current year until the last day of the year (January 1st to December 31st).
- Ability to **Export License Activation Keys** from **Company > Licensing > License Features History** Actions menu. Only the activation keys that were activated online through the solution web interface (**Activate Online** option) are listed in the exported file.
- Microsoft SQL Server 2022 version is now supported for the customer supplied external Database for the Main and Job Reporting Database.
- The Workplace Suite Load Balancer probe endpoint information is documented in this guide. The information can be used by a Load Balancer, which provides failover by detecting when a Workplace Suite Server is no longer available and routes call to a different Suite Server.
- You can set a LDAP connection to communicate using generic LDAP commands. Microsoft Active Directory is the recommended LDAP connection.
- Workplace Suite Solution will no longer require an external database to be set to Microsoft SQL Server 2014 Compatible Mode.
- Added a new feature called as **Job Processing**, which allows you to search the header of a print file for a customizable set of tag strings and submit the job using the Username from the first match. This feature works with incoming Network queues. Typically, this feature will be used to process print output from a specialized application.
- Workplace Suite Desktop Client has been updated to support accessibility requirements for end users that have vision and physical disabilities using third-party accessibility tools to navigate the UI elements.
- The Workplace Suite Job Reporting Installer has been updated and is only required to use on new installations.

New Features in Version 5.7.1

- Supports the ability to **Include the card number in auto registration email** for Azure AD and SAML authentication. The setting to enable this feature is located in **Company > Policies > Security > Printer Authentication > > Basic > Auto Registration > Azure AD Authentication** and **SAML Authentication**.
- Supports the ability to search the user with Primary PINs and Access Card Numbers on the **Users** tab search field.
- Critical security updates and improvements.

New Features in Version 5.7.000

- Load Balancer Server Addresses on Single Sign-On feature:
 - When a Load Balancer has multiple IP addresses, the Workplace Suite Administrator can enter the multiple IP addresses on the Load Balancer Server Address to allow the user to login with the Single Sign-On credentials.
- Log File Collection Assistant on Maintenance: Logs section:
 - The Log File Collection Assistant at the Maintenance section helps the user to download the log files based on a specific issue type. The user will drive a wizard that generates a zip file of the required log files.
- Workplace Suite Server supports Microsoft Windows® Server 2022.
- Workplace Suite Desktop Client supports Windows® 11.

New Features in Version 5.6.700

Improved security for the users Confirmation Number:

- User can no longer retrieve their Confirmation Number, they can only reset it by a two-step verification process.
- On the User Portal Login Page and Mobile Apps screen the Retrieve Confirmation Number action has changed to Forgot Confirmation Number.
- The user must verify who they are by entering a Verification Code received in their email and then they will receive a new Confirmation Number.
- The setting Custom Confirmation Messages is now called Custom Email Response Messages.
- The Custom Email Response Messages can be customized, but you cannot insert the Confirmation Number in the message.

New Features in Version 5.6.500

Xerox® Workplace Suite software version 5.6.500 has the following feature updates and changes:

- New Xerox® Workplace Suite prerequisite software that supports the Xerox® VersaLink® B71XX and C71XX Multifunction Printers.
- Support for SQL Authentication for SQL server database when installing or upgrading the Xerox® Workplace Suite software.
- Improvements for large Deployments:
 - New Desktop Client software update that supports the new Server Communication Mechanism called TCP/IP, you can find this setting on the server Administration page.
 - Print Server Communication to Xerox® Workplace Suite Server has been improved.
 - Ability to download the Print Server logs from the main Xerox® Workplace Suite server.

New Features in Version 5.6.300

Xerox® Workplace Suite software version 5.6.300 has the following feature updates and changes:

- Ability to schedule Job Reporting to run hourly.
- Support for identity provider SAML authentication.
- New prerequisite software that supports the Xerox® EC80XX Color Multifunction Printer.
- Ability for the user to delete their own PINs and Access Card Numbers.

New Features in Version 5.6.100

Xerox® Workplace Suite software version 5.6.100 has the following feature updates and changes:

- Supports Azure AD authentication.
- On new installations, SQL server 2017 Express is installed for the main database server and job reporting database server.
- Allows resetting of the hardware address in the installation wizard when needed.
- On new installations, IIS settings are enabled automatically.

New Features in Version 5.6

Xerox® Workplace Suite software version 5.6 has the following feature updates and changes:

- Addition of forum and announcements links
- Support for Guest user onboarding using email
- Ability to add printer session accounting codes to desktop printed jobs
- Support for LDAP import mapping of the network accounting user ID
- Support for local print optimization for Xerox® Workplace Suite Client
- Support for Offline Mode for the Xerox® Workplace Suite Client
- Support for administrator users without an email address
- Support for SQL Server 2017 and SQL Server 2019
- Support for Windows Server 2008 is removed

New Features in Version 5.5

Xerox® Workplace Suite software version 5.5 has the following feature updates and changes:

- Introduction of the Print Limits Rule feature, that limits printing by number of pages in the job.
- New Incoming or Outgoing server type added with support for Microsoft Graph API to access Microsoft Exchange Online

- Job Reporting improvements and additions are as follows:
 - New Dashboards and redesigned Dashboard layout
 - Ability to export dashboard reports to a PDF or .csv file
 - More report filtering options that include filter by User, Department, Printer, Account ID, and Job type
 - Renamed Billing Code to Account ID on the job report raw data
 - New job reporting raw data fields: Printer IP, Site, and User ID
 - New Summary Reports that provide a summary by User, Printer, Department, Account ID, and Accounting: UserID or AccountID
 - Ability to schedule Summary Reports
 - Scanning Cost estimation is added for the Modify Cost reporting feature
 - New Data Retention Policy setting for the Job Reporting data
- New Workplace Suite Prerequisite software includes support for the Xerox® PrimeLink® C9065/C9070 and PrimeLink® B9100/B9110/B9125/B9136 printers, and AltaLink® B8145/B8155/B8170 and AltaLink® C8135/C8145/C8155/C8170 Multifunction Printers
- Installations and upgrades of the Xerox Workplace Suite Server and Workplace Client software now require Microsoft .NET 4.7.2
- Xerox Workplace Suite software support for Windows® Server 2019 environments
- For installations and upgrades, Workplace Suite server no longer supports Microsoft Windows® 7
- New Workplace Suite Client software release contains bug fixes

New Features in Version 5.4

- Support for Windows Integrated Authentication
- Support for Raw TCP Port printing protocol
- Ability to change the Raw TCP port number
- Updated Workplace Suite Client software
- New prerequisite software and a Printer Model update file support Xerox® PrimeLink® C9065/C9070 printers
- Support for Xerox® PrimeLink® C9065/C9070 printers with Fiery® direct configuration



Note: For details on setup, refer to the *Xerox Workplace Suite Administration and Configuration Guide*.

- Discontinued support for PCL 5

New Features in Version 5.3

- Direct Printing, a Print Management feature that allows desktop printing directly a printer.
- The User Job Limits provide the ability to set print quota rules that control the number of pages a user is permitted to print.
- Support for customer-licensed and installed Microsoft Office 2016 with any Mobile Workflow license.

New Features in Version 5.1


- Support for Multiple Primary PINs and Access Card Numbers for the same user.
- For new installations, the default built-in database software is now MS SQL Express 2014. For existing upgrade solutions that use MS SQLCE, the SQLCE database is retained and used. MS SQL Express 2014 is not installed on existing upgrades.

New Features in Version 5.0

- Content Security Workflow, an updated licensable workflow
- Mobile Print Basic conversion option
- Rules to manage print access
- Web administration role management
- Copy and Scan additions to the Printer Client, for Xerox® AltaLink® printer families
- Copy and Scan additions to the Printer Client, for Xerox® VersaLink® printer families
- Mobile App QR Code and NFC unlock features
- Printer Authentication screen QR Code, for unlocking Xerox® AltaLink® printer families and Xerox® ConnectKey® printer families
- Support for NFC software on ELECTEC TWN4 card readers on Android devices
- Support for TLS 1.2 with any HTTPS communication protocol
- FIPS (Federal Information Processing Standard) support: Available with a new installation, but unsupported as an upgrade
- Mobile Print Opt-out Email Link
- Printer Client icon legacy name support
- Alternate Login option for printer administration
- Character Encoding default setting for each printer

For a new feature list when upgrading from Mobile Print versions 3.5 and 3.6, or PrintSafe version 1.x, refer to the Appendices of the *Upgrade Guide for Print Management and Mobility Suite, Mobile Print, and PrintSafe*, and *Release Content History* information.

Backing Up Your Current Installation

 Important: For Xerox® Workplace Suite software new installations that start at version 5.1 and higher:

- The Backup and Restore feature is not available.
- New installations use an SQL Express 2017 database.

To backup the SQL database, use the Microsoft SQL Management Studio software or a similar tool.

Before You Begin


Before you upgrade any software, ensure that you back up your current Workplace Suite database. If you are using an external MS SQL Database, back up the Workplace Suite database manually.

Backing up the Current Internal Database

1. From the Administrator Tool, select **Company > Maintenance > Backup and Restore**.
2. Click **Actions**
3. Click **Backup**

The backup file is stored on the local file system at C:\ProgramData\Xerox\XMP | BackupAndRestore. If required, copy the backup file to another location.


Upgrading the Prerequisite Software

 Note: If the Workplace Suite Prerequisite software version is the same version that is installed on your server, you can skip the following sections: **Uninstalling Previous Versions of the Workplace Suite Prerequisite Software** and **Upgrading the Prerequisites**.

Before Upgrading

Windows Server 2008 is no longer supported on new installs and upgrades. Before you upgrade, verify that you are running Xerox® Workplace Suite software version 5.0 or later. For upgrade instructions for earlier versions of the software, refer to the *Xerox® Workplace Suite Upgrade Guide for Print Management and Mobility Suite, Mobile Print, and PrintSafe*.

Uninstalling Previous Versions of the Workplace Suite Prerequisite Software

 Important: If you access the print server using the Microsoft Remote Desktop Connection, disable Printer Redirection.

1. Select **Show Options > Local Resources**. Ensure that the check box for Printers is cleared, then click **Connect**.
2. Uninstall the Xerox® Mobile Print Solution, PrintSafe software, or prerequisite software for Xerox® Print Management and Mobility Suite.
 - a. Select **Start > Control Panel > Uninstall a Program**.
 - b. From the Program list, select **Xerox Mobile Print Prerequisites**, **Xerox PrintSafe Prerequisites**, or the **Xerox Print Management and Mobility Suite Prerequisite**.
 - c. Click **Uninstall**.
3. When prompted, restart the server.
4. Before upgrading the software, verify that the Xerox® Mobile Print Solution, PrintSafe Prerequisite software, and Xerox Global Print Driver files are uninstalled:
 - a. Select **Control Panel > View Devices and Printers**, or click the **Devices and Printers** icon.
 - b. In the Printer and Devices window, highlight one printer. The menu bar changes.
 - c. From the menu bar, select **Print Server Properties**.
 - d. Select the **Drivers** tab.
 - e. Review the Installed Printer Drivers list, and, if shown, remove the following drivers:
 - Xerox® Global Print Driver PCL
 - Xerox® Global Print Driver PCL6
 - Xerox® Global Print Driver PS
5. To remove a print driver from the list, perform the following procedure:
 - a. Highlight the driver file, then click **Remove**.
 - b. Select **Remove driver and package**, then click **OK**.
 - c. Click **OK**, click **Delete**, then click **OK**.
To remove any remaining print driver files from the Installed Printer Drivers list, repeat the steps as needed.

Installing the New Prerequisite Software

Before you install the new Prerequisite software, verify that Microsoft .NET Framework 4.7.2 or greater is installed.



Important: If you access the server using the Microsoft Remote Desktop Connection application, disable Printer Redirection.

1. To disable Printer Redirection, from the Remote Desktop Connection, click **Show Options > Local Resources**. Ensure that the check box for Printers is cleared, then click **Connect**.
2. Log in to the server as the administrator at the installation location.

Upgrading the Prerequisites

1. Double-click the **XeroxWorkplaceSuitePrerequisites** file.
2. From the menu, select your language for installation, then click **OK**.

A splash screen appears, then the Install window updates while the installation files are extracted and decompressed. The Windows Installer window opens, then the Installer checks for prerequisites. After a few minutes, the Xerox Setup Wizard window opens, and a Welcome message appears.
3. After the Welcome message appears, click **Next**. To view additional information about the software, click **View Readme**. The License Agreement window appears.
4. Read the license agreement. To accept the terms, select **I accept the terms in the license agreement**, then click **Next**. The Destination Folder window appears.
5. The default folder where the software is installed is specified on the Destination Folder page.
 - a. To select a different folder, click **Change**, then navigate to the new folder.
 - b. To accept the new destination folder and return to the Destination Folder window, click **OK**.
 - c. To continue the installation, click **Next**. The Ready to Install window appears.
6. Click **Install**. A status progress bar appears. It takes several minutes for the installation to complete.
7. If there are any errors during installation, refer to the *Xerox® Workplace Suite Troubleshooting Guide*.
8. After the installation completes, the Install Completed window appears. Click **Finish**. The Installer window closes, then a dialog window appears that instructs you to restart the server.
9. To restart the server, click **Yes**.
10. Log in to the server as an Administrator.

Upgrading the Xerox® Workplace Suite

If you use Mobile Print Workflow, you can upgrade your Microsoft Office 2007 or Microsoft Office 2013 software conversion server to Microsoft Office 2016 software. No additional license is required. For more information, refer to [Upgrade Options for Mobile Print Conversion Engine Office Component](#).

Upgrading the Xerox® Workplace Suite Software



Note: Typically, your current installation settings are retained during an upgrade. To avoid losing your data, do not change the SQL Server selection setting unless you are instructed to do so.



Note: If you are planning to change your SQL Server Authentication type, refer to the *Workplace Suite Major Upgrade Guide*. The Minor Upgrade Guide does not document configuration changes.

1. Use the same login credentials as when you installed the Workplace Suite software initially. Log in to the server as an administrator.

2. Double-click the Workplace Suite Software Installer file named `XeroxWorkplaceSuite_x.x.x.x.exe`.

The Software Install Wizard appears. A splash screen appears, then the Install window updates while the installation files are extracted and decompressed. The Windows Installer window opens, then the Installer checks for prerequisites. After a few minutes, the Xerox Setup Wizard window opens, and a Welcome message appears.

3. Select your language for the upgrade instructions, then click **OK**.

An Upgrade Installation Confirmation message appears.

4. Click **Yes**.

5. After the Welcome message appears, to continue the installation, click **Next**.

The License Agreement window appears.

6. Read the license agreement. To accept the terms, select **I accept the terms in the license agreement**, then click **Next**.

The Windows Features window appears

7. Ensure that all the Windows Features are enabled, if any features are not enabled select **Enable** and then click **Next**.

The Select SQL Server option window appears.

8. Select **Use the existing installation configuration** to maintain your current installation configuration.

This is the default SQL server option.



Note: To avoid losing data, it is recommended not to change the default SQL Server option, unless you are instructed to do so.



Note: If you receive an error message that states `Database Server does not Exist or access denied.`, it is because that this error most likely occurs on the first upgrade after a server hostname change. To continue the installation, you have to select the radio button for **Use a new SQL Server (create new configuration)** and refer to the Xerox Workplace Suite Major Upgrade Guide *Create a New SQL Configuration* section to create a new SQL Server Database.



Note: If you need to change from your current SQL Server to a new SQL Server, refer to the Xerox Workplace Suite Major Upgrade Guide *Create a New SQL Configuration* section.

9. Click **Next**.

Destination Folder window appears.

10. At the Destination Folder, ensure that the destination is correct and then click **Next**.

Ready to Install window appears.

11. Click **Install**.

The Installation Progress window appears with a status bar. The installation can take several minutes to complete.

12. When the installation completes, and the Setup Complete window appears, click **Finish**.

The Installer window closes.

13. To validate the installation on the Workplace Suite Server, open the Administration webpage and perform one of the following methods:

- On your server, open a Web browser. In the browser address field, type `https://localhost/login`, then click **Enter**.
- From the Windows Start menu, select **All Programs > Workplace Suite Administrator**.

Upgrading the External Print Servers

Guidelines:

- Whenever you upgrade the primary Xerox® Workplace Suite server, it is recommended to upgrade the External Print Servers to the same software release.

Upgrading the External Document Conversion Servers

Guidelines:

- Whenever you upgrade the primary Xerox® Workplace Suite server, it is recommended to upgrade the External Document Conversion Servers to the same software release.

Upgrading the Xerox® Workplace Client



Note: If the Workplace Client software version is the same version that is installed on your desktop, you can skip this upgrade.

The Workplace Client software requires .Net Framework 4.7.2.

The Print Management Direct Print feature requires Workplace Client software version 5.4 or later.

To upgrade the Workplace Client software, follow the instructions in the *Xerox® Workplace Suite Print Management Workflow User Guide*. Install the Workplace Suite Client software for Client Print Server Configurations.

Upgrade Options for Mobile Print Conversion Engine Office Component

Mobile Printing Workflow Document Conversion Engine Upgrade Paths

If you are using the original Microsoft Office 2007 Mobile Print Conversion Engine, Office 2013 software, or the built-in Xerox Mobile Printing Workflow Conversion Server, after upgrading to Xerox Workplace Suite software version 5.4 or later, choose from one of the following options:

- Continue to use your existing conversion server configuration without upgrading.
- Upgrade the conversion server using your licensed copy of Microsoft Office 2016 Professional software. For details, refer to [Document Conversion Server Upgrade Options](#).
- Remove any installed versions of Microsoft Office software from your server, and use the built-in conversion server. For details, refer to [Document Conversion Server Upgrade Options](#).
- To ensure consistent document output, set up all conversion servers in your environment with the same conversion server configuration. If the conversion servers are not set up with the same conversion server configuration, an error message appears on the Administration page of the Xerox Workplace Suite webpage.



Note: The Mobile Print Premium or Basic License supports any of the upgrade paths listed in the following section.

Mobile Printing Workflow Document Conversion Server Options

If you choose to upgrade the Mobile Printing Workflow Conversion Server, the following upgrade options are available:

- **Mobile Print with Built-in Conversion Server:** The built-in conversion server that is supplied with Mobile Print provides good conversion fidelity, and high conversion performance. When Microsoft Office is not installed, this option is the default conversion server.
- **Mobile Print with Microsoft Office 2016 Conversion Server:** A user-supplied and licensed copy of Microsoft Office 2016 Professional as the Mobile Print Conversion Server provides better conversion fidelity than the built-in conversion server.

- **Mobile Print Premium with Microsoft Office 2013 Conversion Server:** This option is no longer available. If you currently have this option, you can upgrade to Office 2016 using your own Office license, or you can uninstall Office and use the Built-in Conversion Server. Refer to the following upgrade options.

Document Conversion Server Upgrade Options

Using Your Own Licensed Copy of Microsoft Office 2016 Professional Software

1. Uninstall any existing versions of Microsoft Office software from the server.
2. Install and activate Microsoft Office 2016 software.
3. Restart the server.

Upgrading to the Built-In Conversion Server

1. Uninstall any existing versions of Microsoft Office.
2. Restart the server.

External Conversion Server Licensing

- For external document Conversion Servers with configurations using a customer-supplied copy of Microsoft Office 2016 or the built-in Conversion Server, no additional server licenses are required.