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Documents Xpress — Xerox Web Document Submission Software Version 2.0

Installation and Configuration Guide

Documents Xpress —
Xerox Web Document Submission Software Version 2.0

Installation and Configuration Guide

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Changes are periodically made to this document. Changes, technical inaccuracies, and typographical errors will be corrected in subsequent editions.

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>).

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1. Introduction

This chapter describes Documents Xpress — Xerox Web Document Submission Software Version 2.0 and how to use this manual.

Documents Xpress — Xerox Web Document Submission Software

Documents Xpress allows end users to submit print jobs electronically using industry standard browsers. Once submitted, production personnel efficiently update job status as documents move through the production cycle, providing users with information about their jobs. Web-based printing generates cost savings and improvements in quality, productivity, and turnaround time.

The system uses several services that can be loaded on one or more servers, depending on the print shop configuration.

Intended Audience

This manual is intended for use by Xerox personnel who are responsible for the installation of this system.

Assumptions

The person installing Documents Xpress software should have experience in the following areas:

- Windows NT server and / or Windows 2000 server administration
- Applicable workstation operating systems experience
- Hypertext Markup Language (HTML)
- Extensible Markup Language (XML)
- JavaServer Pages (JSP)
- Structured Query Language (SQL)

Conventions

This guide uses the following conventions:

- Menu items and buttons appear in **bold text**.
- Screen, text box, and drop-down list titles, are spelled and punctuated exactly as they appear on the screen.
- Document titles appear in *italics*.
- Content representative of text that is displayed on a computer monitor is displayed in Courier New font and enclosed in a shaded table as shown in Table 1-1.

Table 1-1. Example of text displayed on a computer monitor

```
INSERT INTO Field {field_name, custom_name}
```


Related Documentation

The following manuals provide further information on the Documents Xpress system:

- *Documents Xpress — Xerox Web Document Submission Software Installation Planning Guide – 701P37977*
- *Documents Xpress — Xerox Web Document Submission Software System Administration Guide – 701P37979*
- *Documents Xpress — Xerox Web Document Submission Software Product Overview Guide – 701P37980*
- *Documents Xpress — Xerox Web Document Submission Software Product Overview Training – 701P37981*

Note: Operator / Administrator and User instructions are available as online help while using the Documents Xpress system.

2. Product Overview

Documents Xpress is a web-based application used to submit and track jobs.

System users access the software via three web interfaces:

- A User interface for submitting print jobs
- An Operator interface for printing jobs
- A Printer Administrator interface for setting up printers and templates, customizing the user interface, and establishing pricing

Responsibilities

System Administrator

The System Administrator manages user, operator, and print shop administrative permissions for a print shop installation. Specific tasks include:

- Managing Documents Xpress software
- Customizing the Documents Xpress user interface
- Managing user / operator permissions for a single print shop

The System Administrator will have a detailed understanding how the Documents Xpress software works.

Print Shop Administrator

The Printer Administrator is a user who manages a print shop. Specific tasks include:

- Establishing specific print shop policies
- Configuring printers
- Generating reports using Documents Xpress tools
- Load pricing data into Documents Xpress
- Creating templates

The Print Shop Administrator must understand how to configure a printer and how printer communications work.

Print Shop Operator

The Print Shop Operator is a user who manages the printing workflow in a print shop. Specific tasks include:

- Printing jobs sent by end users
- Modifying the job status as jobs move through the workflow
- Distributing printed materials

The Print Shop Operator must have detailed knowledge of scheduling and prioritizing print jobs as well as a solid understanding of the capabilities and capacities of the print shop.

User

The User submits documents and jobs to Documents Xpress over the Internet using a web browser, the Xpress Print Driver (XPD), or in some installations through DocuShare. Specific tasks include:

- Using Documents Xpress as the interface to the print shop and local printers
- Uploading documents into Documents Xpress
- Requesting printing and resubmission services using Documents Xpress

The User must be knowledgeable about basic web browser use, general Internet use (downloading, uploading, and navigation), and printer driver installation.

3. Installation Requirements

Documents Xpress requires a specific combination of hardware, software, and information to ensure a successful installation. These requirements are documented in the *Documents Xpress — Xerox Web Document Submission Software Installation Planning Guide*.

These installation instructions assume that the Documents Xpress server has had the proper operating system installed and has a working connection to the Internet.

Hardware Requirements

Server Requirements

- One Windows NT 4.0 **or** Windows 2000 server
- 9-GB hard disk
- 512-MB random access memory (RAM)
- One 10/100 MBPS network interface card (NIC)
- One available drop on a 100-MBPS network
- Simple Mail Transfer Protocol (SMTP) server supporting Anonymous SMTP connections for outgoing mail
- An uninterruptible power supply (UPS) for the server

Client Requirements

- Workstation capable of using a supported operating system and a supported browser

Software Requirements

Server Requirements

- Microsoft Windows NT Server 4.0 **or** Microsoft Windows 2000 Server
- Microsoft TCP / IP Printing service (LPR service) installed (Windows NT Server 4.0 only)
- Microsoft Office XP
- Adobe Acrobat Reader
- Documents Xpress software
- Internet Explorer 5.5 (or later) **or** Netscape Navigator 4.75 (or later)
- WinZip

Client Requirements

- Any one of the following operating systems:
 - Windows NT Workstation 4.0
 - Windows 2000 Professional
 - Windows 95 / 98 / ME
- Adobe Acrobat Reader
- Internet Explorer 5.5 (or later) **or** Netscape Navigator 4.75 (or later)
- WinZip

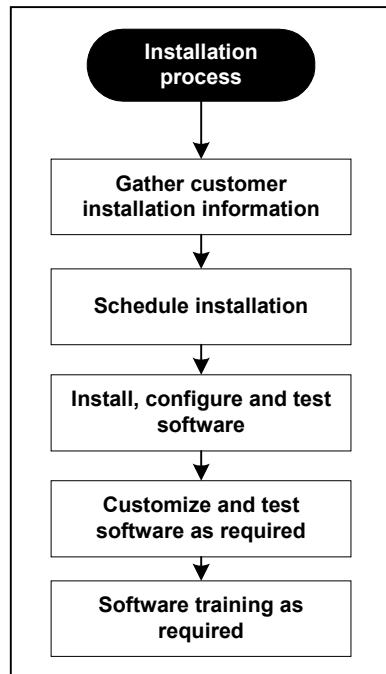
Information Requirements

See the *Documents Xpress — Xerox Web Document Submission Software Version 2.0 – Installation Planning Guide* for a complete list of the information requirements.

4. Installing the Software

Obtain the *Documents Xpress — Xerox Web Document Submission Software Version 2.0 – Installation Planning Guide* before installing the software. The following figure, Figure 4-1 gives an overall look at the workflow for the complete installation process.

Figure 4-1. Documents Xpress installation process

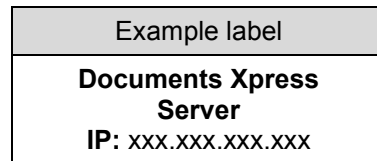


When performing an installation, the following, including third-party software and printer driver, must be present and properly configured on the server before installing Documents Xpress software:

- Adobe Acrobat Reader
- XDX PDFwriter print driver
- Microsoft Office XP

It is recommended that the server be assigned a name and physically labeled with the applicable name and machine IP address. An example is shown in Figure 4-2.

Figure 4-2. Example server label



Third-party Software and Printer Driver Installation

Installing Adobe Acrobat Reader

The system uses Adobe Acrobat Reader to convert documents to PDF format. If Adobe Acrobat Reader is not already installed on the Documents Xpress server, it must be downloaded from Adobe and then installed.

Perform the following to install Adobe Acrobat Reader:

1. Go to <http://www.adobe.com> and download a copy of Acrobat Reader. Choose either the base version, or the version that can search PDF files. Either free version will work with Documents Xpress.
2. Follow the instructions from Adobe to install Adobe Acrobat Reader.

Note: Restarting the server is not necessary at this time. The server will be restarted as part of the final installation procedure.

Adding the Print Driver

The Xpress Print Driver (XPD) is used to convert documents to PostScript before they are sent to the printer.

Perform the following to add the XPD:

Windows NT 4.0 Server

1. Create a folder named **XPD** on the **C:** drive of the server.
2. Unzip **xpd-1.1.3.zip** into the newly created XPD folder. This file is in a Java archive (jar) file on the installation CD at **<CD ROM drive>/ installer.jar**. Use WinZip to open **installer.jar**. When the file listing appears in WinZip, locate and double-click **webAppServer_dist.zip**. Inside this zip file is **xpd-1.1.3.zip**. Unzip this file without closing any previous WinZip windows.
3. Click **Start > Settings > Printers**.
4. Double-click **Add Printer**.
5. Ensure **My Computer** is selected and click **Next**.
6. For the port, select **File**. Click **Next**.
7. The list of manufacturers of printers appears. Click **Have Disk**.
8. The **Install from Disk** dialog box appears. Browse to **C:/XPD**.
9. When in the XPD folder click **webxpd.inf**. Click **Open**.
10. The **Install From Disk** dialog box appears. Click **OK**.

11. Select **Documents Xpress PS Color Plugin**. Click **Next**.

Note: Only the color driver needs to be selected for the server since it will handle both color and black and white jobs.

12. Type **XDX PDFwriter** in the Printer name text box. Click **Next**.

Note: This is case and space sensitive. There is a space between the letter X and the letter P.

13. Click **Not shared**. Click **Next**.

14. Click **No** to bypass printing a test page. Click **Finish**.

Windows 2000 Server

1. Create a folder named **XPD** on the **C:** drive of the server.

2. Unzip **Xpdy2k.zip** into the newly created XPD folder. This file is in a Java archive (jar) file on the installation CD at **<CD ROM drive>/ installer.jar**. Use WinZip to open **installer.jar**. When the file listing appears in WinZip, locate and double-click **webAppServer_dist.zip**. Inside this zip file is **Xpdy2k.zip**. Unzip this file without closing any previous WinZip windows.

3. Click **Start > Settings > Printers**.

4. Double-click **Add Printer**.

5. The **Add Printer Wizard** appears. Click **Next**.

6. The **Local or Network Printer** window appears. Click **Local Printer**. Clear **Automatically detect and install my Plug and Play Printer**. Click **Next**.

7. For the port select **File**. Click **Next**.

8. The list of manufacturers of printers appears. Click **Have Disk**.

9. The **Install from Disk** dialog box appears. Click **Browse** and browse to **C:/XPD**.
 10. When in the XPD folder click **webxpd.inf**. Click **Open**.
 11. The **Install From Disk** dialog box reappears. Click **OK**.
 12. Select **Documents Xpress PS Color Plugin**. Click **Next**.
- Note:** Only the color driver needs to be selected since it will handle both color and black and white jobs.
13. Type **XDX PDFwriter** in the Printer name text box. Click **Next**.
- Note:** The print name is case and space sensitive. There is a space between the letter X and the letter P.
14. Click **Do not share this printer**. Click **Next**.
 15. To ensure that a test page is not printed click **No** Click **Next**.
 16. The **Completing the Add Printer Wizard** window appears. Click **Finish**.
 17. A warning that the **Digital Signature not found** appears. Click **Yes**.
 18. Close all open windows. The XDX printer driver has been installed.

Installing Microsoft Office XP

Microsoft Office XP must be installed in order for print drivers to process Office documents.

Perform the following to install Microsoft Office:

1. Insert the Microsoft Office CD in the CD-ROM drive.

Note: If the Microsoft Office installation does not begin after inserting the CD, follow the instructions distributed with Microsoft Office on manually starting an installation.

2. Start the installation process and choose **Typical** installation.
3. Accept all defaults ensuring that Word, Excel, and PowerPoint are installed.
4. Remove the CD from the CD-ROM drive.
5. Restart Windows when prompted.

Post Installation Tasks

In order for the Documents Xpress system to operate, Adobe Acrobat Reader, and Microsoft Office must be started to accept license agreements. Failure to do so will keep the system from operating.

Start both Adobe Acrobat and Microsoft Office. Accept their licensing agreements and then close Acrobat and Office before installing Documents Xpress.

Documents Xpress License Generation

The Documents Xpress installation program requires a license diskette. Generate a license using the XDX License Generation Tool 1.0 before installing Documents Xpress.

The computer where the XDX License Generation Tool 1.0 is run must have Java 2 Runtime Standard Edition v1.3.1 installed in order to use the tool.

CAUTION: Do not install Java 2 Runtime on the Documents Xpress server. Documents Xpress will not run properly if Java 2 Runtime is installed on the server. Instead, install Java 2 Runtime on a laptop or client workstation to use the license tool.

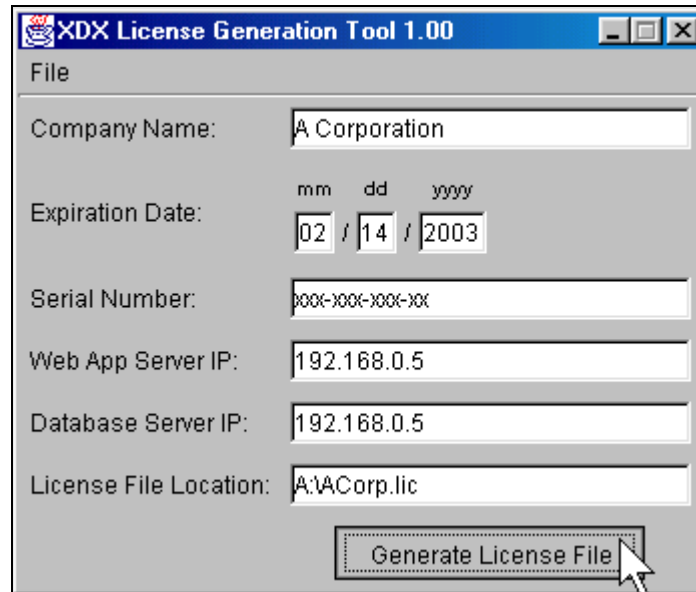
Note: This procedure requires a blank floppy disk.

Perform the following to generate a license:

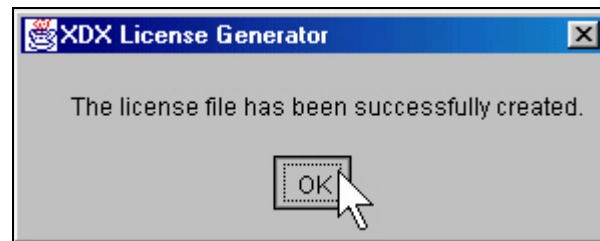
1. Double-click **license_gen.jar**.
2. The **XDX License Generation Tool 1.00** window appears. Type the following information into the appropriate fields:
 - **Company Name** – Type the full company name
 - **Expiration Date** – Type the date that is one year from the installation date
 - **Serial Number** – Type the nine digit serial number
 - **Web App Server IP** – Type the IP address of the Documents Xpress server
 - **Database Server IP** – Type the IP address of the Documents Xpress server
 - **License File Location** – Type the name of the license file in the following format:

<floppy drive letter>:\<license file name>.lic

When all the fields are complete, ensure there is a floppy disk in drive A and click **Generate License File**.



3. The **License Generator** window appears. Click **OK**. Remove and label the floppy disk for use in the installation process.



Note: If the program indicates an error with the expiration date, exit the program and start the licensing process again. The expiration date cannot be edited once set.

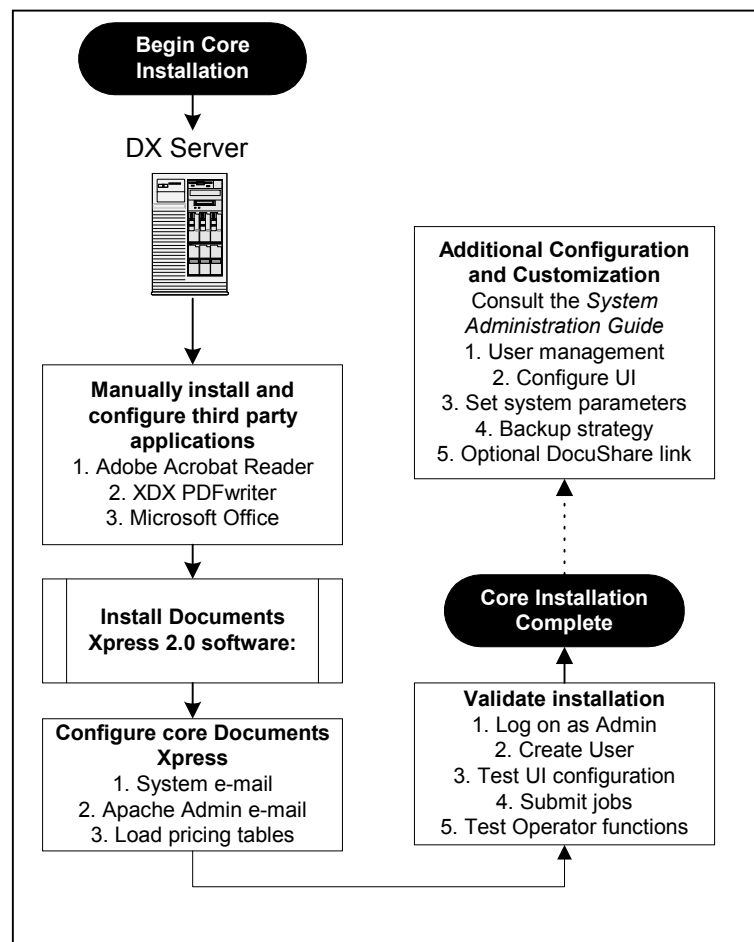
Installing Documents Xpress

This section gives procedures on installing the core Documents Xpress software. Once operational, the chapters that follow give procedures on testing the installed configuration of the software at a customer site.

CAUTION: Ensure that the Display Properties for the server monitor is set to a minimum of 256 colors. The installation program will not appear on the screen if a lower number of colors is selected.

The Documents Xpress server contains the application server software, the database server, the web server software and the repository. Figure 4-3 illustrates the workflow for installing the core product.

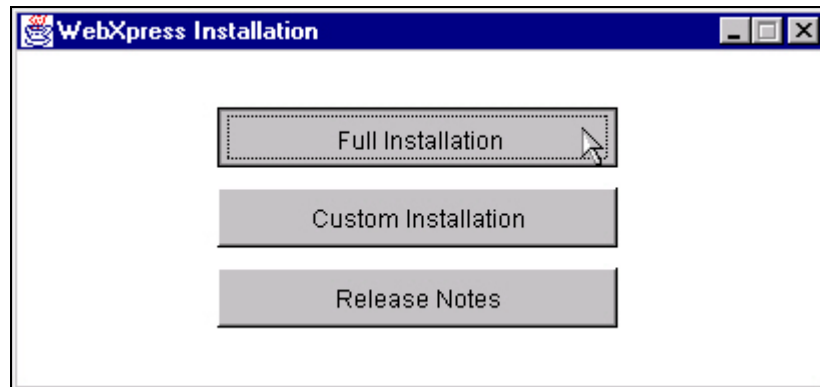
Figure 4-3. Documents Xpress software installation workflow



Documents Xpress Software Installation

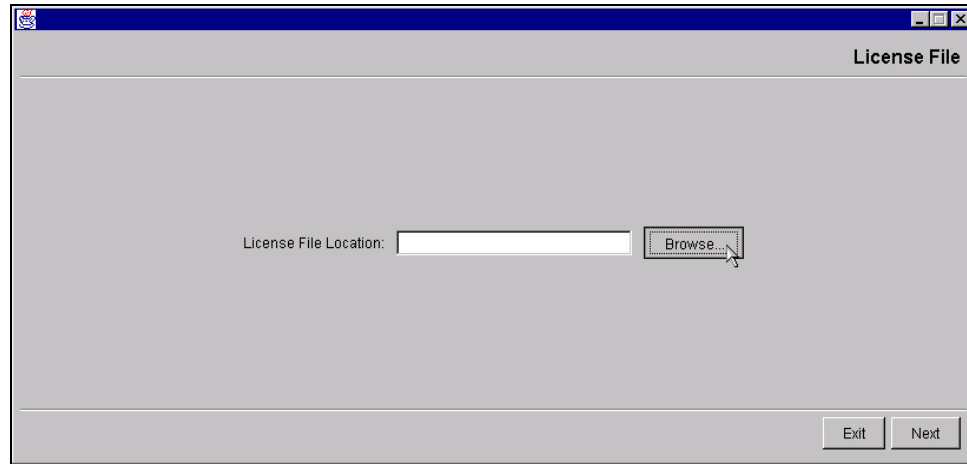
Perform the following to install Documents Xpress software on the server:

1. Insert the Documents Xpress installation CD into the CD-ROM drive of the server.
2. Double-click **My Computer**.
3. Double-click the CD-ROM drive where the Documents Xpress software appears.
4. Double-click **runInstaller.bat**.
5. A command window appears followed the **WebXpress Installation** window. Click **Full Installation**.



Note: The WebXpress Installation window may appear behind the Command window when installing on a Windows 2000 server. Minimize the Command window to see the Installation window.

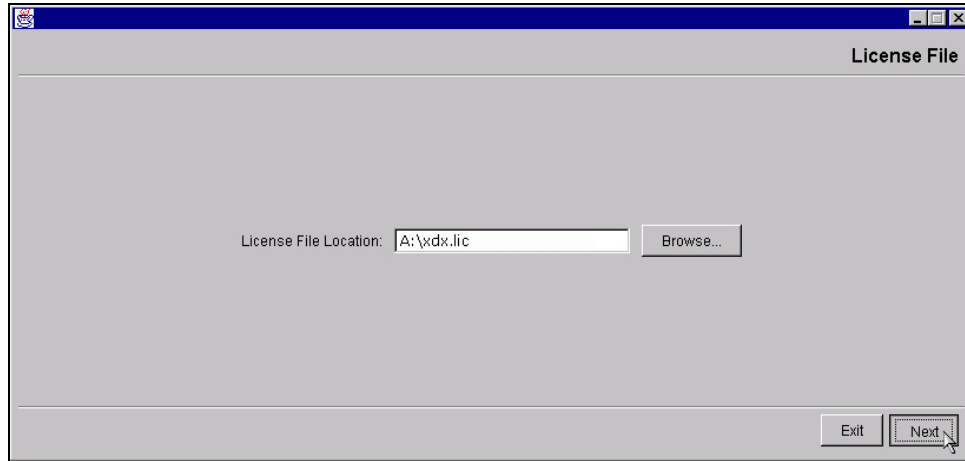
- The **License File** window appears. Insert the license floppy disk in drive A. Click **Browse**.



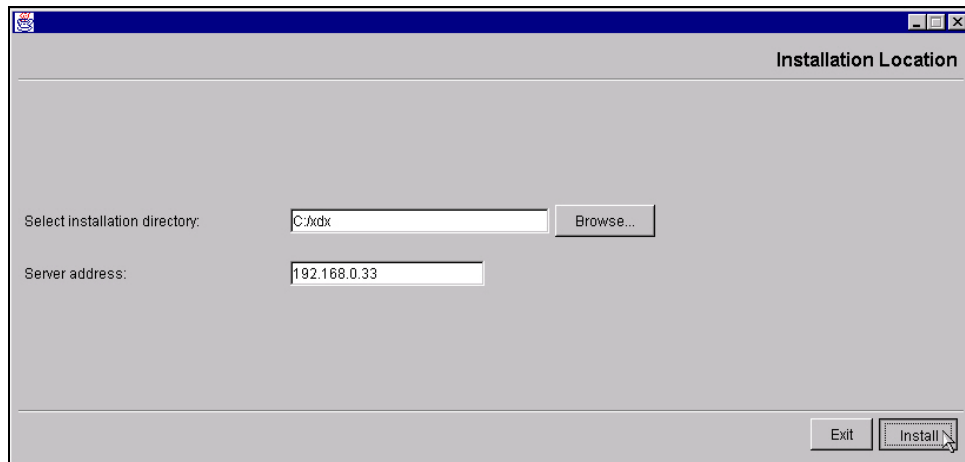
- Ensure that the license file is in the **File Name** window. Click **Select License File**.



8. The **License File** window reappears. Click **Next**.



9. The **Installation Location** window appears. The default installation directory is **C:\xdx**. Ensure the **Server address** is the IP address of the server where Documents Xpress is being installed. Click **Install**.



10. After several minutes, the **Installation Complete** window appears. Click **Done**.



Exit the Installation Program

Perform the following to exit the installation program:

1. The **WebXpress Installation** window reappears. To exit the installation program, click **X**.



2. Remove the installation CD.
3. Restart the server.

If there were problems and the installation did not complete properly, consult *Chapter 6 – Troubleshooting*.

Configuring the Documents Xpress Core Installation

The addresses for the e-mail server and administrator must be configured for the Documents Xpress system to operate properly.

CAUTION: Without these addresses configured, the Documents Xpress system will not validate any new users.

Perform the following to set e-mail server and administrator addresses for the system:

1. On the server, double-click **My Computer**. Go to **C:\xdx\scripts** and double-click **ControlCenter**.

Note: To simplify startup of Documents Xpress, create a shortcut to Control Center on the desktop.

2. Once the Control Center has started, the database must be started. Click **1 : Database Server**. The MySQL tab appears.
3. On the **XDZ Control Center** click **Tools > Configuration Manager**.
4. The **configuration_control_panel** window opens. Click the **+** next to the **xdxConf** folder.
5. Click the **+** next to **properties**.
6. Click the **+** next to the **Email** folder.

Note: This next set of configuration items deals with e-mail properties. Consult the *Documents Xpress Installation Planning Guide* for the required information for this section.

7. Click **Email Subject**. Type the subject line of the e-mail messages sent to warn users that their documents will be deleted in place of the default property value.
8. Click **Admin Email Address**. Type the Documents Xpress administrator e-mail address in place of the default property value.

9. Click **Email Footer**. Type the text to be appended to the end of every outgoing e-mail message in place of the default property value.
10. Click **Printshop Name**. Type the name of the print shop, used in e-mails to users in place of the default property value.
11. Click **Email Server**. Type the IP address of the designated e-mail server in place of the default property value.
12. Click **File > Save** to save all changes.
13. If required, enter the **Username** Admin and the **Password** 22222. Click **OK**.
14. Click **X** to close the **configuration_control_panel** window.



15. Click **File > Reload XML**. When asked **Are you sure you want to stop all processes...** click **Yes**.
16. All processes stop. The core system is now installed.

Configure Apache Administrator E-mail Address

The Apache web server software can e-mail the system administrator if there are internal problems with the web server. Follow these instructions to set the e-mail address:

Perform the following to configure the Apache Administrator e-mail address:

1. On the server double-click **My Computer**.
Go to **C:\xdx\etc\Apache\conf**.
2. Open **httpd.conf** in a text editor.

3. Search for the line **ServerAdmin @admin_email@** and replace **@admin_email@** with the System Administrator e-mail address.
4. Save the file, overwriting the existing httpd.conf.
5. Close all open windows.

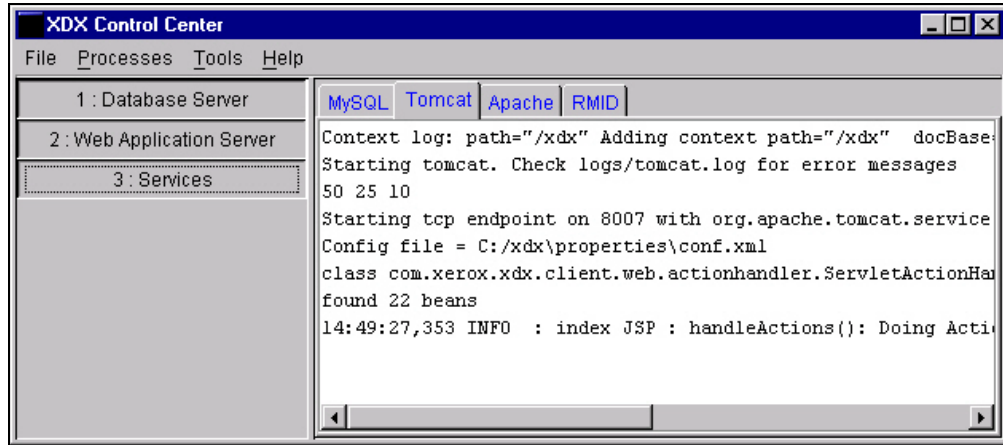
5. Starting Up and Shutting Down

The XDX Control Center application is used to start and stop the various Documents Xpress components. When starting Documents Xpress it is necessary to go to the Documents Xpress server and run the XDX Control Center.

A tab appears in the Control Center for each component as it is accessed. Tab names are red if the component is loading, black if the component is waiting to be loaded, and blue if the component has loaded properly. An example of the Control Center appears in Figure 5-1.

CAUTION: After using the Control Center to start Documents Xpress services, minimize the Control Center but **DO NOT** close it. Closing the Control Center shuts down Documents Xpress.

Figure 5-1. XDX Control Center as it appears on the Documents Xpress server with all components loaded and operational



Starting Documents Xpress

Starting Documents Xpress requires using the XDX Control Center application on the Documents Xpress server.

Starting Documents Xpress For the First Time

Perform the following to start Documents Xpress for the first time:

1. On the server, double-click **My Computer**. Go to **C:\xdx\scripts** and double-click **ControlCenter**.
2. Once the Control Center has started, click **1 : Database Server > 2 : Web Application Server > 3 : Services**.
3. Double-click **My Computer**. Go to **C:\xdx\scripts** and double-click **Admin-LoadPricing**.

CAUTION: Only load the Pricing Tables this one time. It initializes the MySQL tables for use by Document Xpress Print Shop Administrators. Loading the Pricing Tables again will erase any changes made since the tables were initialized the first time.

Note: After starting the processes, wait approximately one minute before starting access from any client machines.

The following figure, Figure 5-2, describes the components started with the Control Center.

Figure 5-2. Description of components started with the Control Center

Component	Description
RMID (Remote Method Invocation Daemon)	A utility that XDX services use for activation
MySQL (Database Server)	The database management system that tracks users and jobs in the system
Tomcat (used by Web Server)	Tomcat is a servlet container with a Java Server Pages (JSP) environment. A servlet container is a runtime shell that manages and invokes servlets on behalf of users.
Apache (Web Server)	The web server for the Documents Xpress system

Testing Documents Xpress

Once Documents Xpress has been installed, test the software to ensure that it is operating correctly. The following steps are only a basic test to see if the software is functioning. To test system operations completely, consult the *Install Verification Procedure* chapter in Appendix A.

Testing Documents Xpress

Perform the following to test the Documents Xpress user log on:

1. Open a browser window on a workstation connected to the network or one of Documents Xpress servers.
2. In the address line, type the IP address that will point to the Documents Xpress Web Application Server. In most cases, it is the IP address of the Documents Xpress server, which hosts the web server software.

http:// <Documents Xpress server IP address>/xdx

3. The initial log on screen appears after several moments. Log on with the User Name admin and the password 22222. Attempt to submit a job.

Perform the following to test the Documents Xpress administrator log on:

1. Open a browser window on a workstation connected to the network or one of Documents Xpress servers.
2. In the address line, type the IP address that will point to the Documents Xpress Web Application Server. In most cases, it is the IP address of the Documents Xpress server, which hosts the web server software.

http:// <Documents Xpress server IP address>/xdx/admin

3. The initial log on screen appears after several moments. Log on with the User Name admin and the password 22222. Attempt to view the job submitted

Shutting Down Documents Xpress

To shut down the system, first close the Documents Xpress components from the Control Center and then close the Control Center.

Shutting Down Documents Xpress

Perform the following to shut down Documents Xpress using the Control Center:

1. On Server 1, click in the following order:
1 : Database Server > 2 : Web Application Server > 3 : Services.
2. Close the **Control Center** by clicking **X**.



6. Troubleshooting

This section describes two methods for helping to diagnose problems that may occur. For further assistance with troubleshooting problems, consult *Chapter 7 – Contacts and Escalation Process*.

Installation Problems

The simplest way to ensure there are no installation problems is to have a clean server. If there are old versions of Documents Xpress, they must be removed. Any existing versions of MySQL and any Java must also be removed.

If an installation is not working, often it is easier to delete the **C:\xdx** folder and begin the installation again. Shut down Documents Xpress and reboot the server. After the server has restarted, remove the **C:\xdx** folder. Complete instructions are given in the *Documents Xpress Web Document Submission Software Version 2.0 System Administration Guide*.

Debugging Apache and Tomcat

The Apache server logs (access.log and error.log) are located in C:\xdx\etc\Apache\logs and the Tomcat servlet engine logs (jasper.log, servlet.log, and tomcat.log) are located in C:\xdx\etc\Apache\tomcat\logs. These logs provide valuable troubleshooting information if the software is not operating properly.

In addition, at c:\xdx are two additional log files – RMID.log and Tomcat.log.

Note: Each time Apache is started, the previous error log is reopened and new information is appended to the end of the file. If there is an error in the system, the logs will contain debugging information.

Debugging Documents Xpress Services

Debugging output is saved to file and displayed by each Documents Xpress service. If there is an error with the system, examine the XDX Control Panel window of the appropriate service to determine where the error has occurred. Generally, if there is a problem, a Java exception will be displayed in the window. This message can be used to determine exactly what errors have occurred in the system.

The log file messages that appear for Tomcat can be modified by starting the **Configuration Control Panel** from the XDX Control Center. These steps assume the XDX Control Center is operational and the Documents System is running.

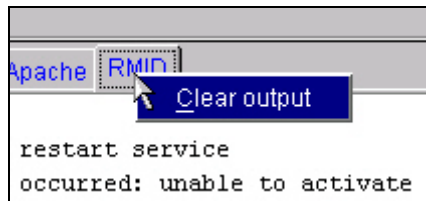
Perform the following to modify the logging messages for Tomcat:

1. On the **XDX Control Center** click **Tools > Configuration Manager**.
2. The **configuration_control_panel** window opens. Click the **+** next to the **xdxConf** folder.
3. Click the **+** next to **properties**.
4. Click the **+** next to the **Logging** folder.
5. Change the Property Value from **info** to **debug**. This will increase the level of information returned from the system.

6. Click **File > Save** to save all changes.
7. If required, enter the Username **Admin** and the Password **22222**.
Click **OK**.
8. Click **X** to close the **configuration_control_panel** window.



The log for any tab in the Control Panel window can be cleared by right-clicking the tab and selecting **Clear output**.



7. Contacts and Escalation Process

This chapter describes the support process and support contacts available for Documents Xpress.

Documents Xpress Support Process

At the time of installation, a Customer Solution Administrator (CSA) will be identified. The CSA is available to manage all software-related issues. The CSA, who has the skills of a system administrator, handles the day-to-day service and support operations at the customer site. The CSA is the main interface to the Documents Xpress Support Center.

Note: If a problem relates to a Xerox output device and not the software please contact the appropriate Xerox Support Center for that product. If a problem relates to the computer server hardware, contact the manufacturer of the server.

Here is the process for initiating support:

1. When the end user or operator encounters an error with the software, they should contact the CSA.
2. The CSA performs system level isolation and problem resolution for Documents Xpress.
3. If the CSA is not able to resolve the problem, the problem is escalated to Documents Xpress Support Center for support.

Note: Only the CSA can call the hotline for support.

Support Contacts

Documents Xpress has an e-Support website available at <http://www.xerox.com/webdocumentsubmission/support>. The e-Support website provides a searchable knowledgebase, Frequently Asked Questions (FAQ's), and the ability to submit a support request via e-mail.

Contact the designated CSA for support. The CSA will contact the Documents Xpress Support Center if they require additional assistance. The Support Center can be reached at **1-888-508-5244**, 8:00 a.m. to 5:00 p.m., Monday through Friday, local time.

A. Install Verification Procedure

Use this chapter to verify a successful installation of Documents Xpress. Record all test results pertinent to a specific install in the worksheets provided in this chapter.

Functional Areas Being Verified

This section provides an overview of the functional areas verified after software installation.

Administrative Functions

Administrative functions that will be tested are listed in Table A-1.

Table A-1. Administrative functions and procedures

Function	Test Procedure
Log on as Administrator	1.1
Add Printer (Default and others in print shop)	1.2
Edit User Interface Using Admin Tools	1.3

Client Functions

Client functions that will be tested are listed in Table A-2.

Table A-2. Client functions and procedures

Function	Test Procedure
Register Your Account	2.1
Log on as End User	2.2
Edit User Profile	2.3
Submit Print Job Request – MS Word Document	2.4
Submit a Print Job Request – MS Excel Document	2.5
Submit a Print Job Request – Hard copy Document	2.6
Edit Personal Address Book	2.7
Edit Document Repository	2.8

Operator Functions

Operator functions that will be tested are listed in Table A-3.

Table A-3. Operator functions and procedures

Function	Test Procedure
Log on as Operator	3.1
Edit a Client Job Request – MS Word Document	3.2
Fulfill a Client Job Request – MS Word Document	3.3
Fulfill a Client Job Request – MS Excel Document	3.4
Fulfill a Client Job Request – Hard copy Document	3.5
Send a Print Job to Each Installed Printer	3.6

Install Verification Procedures

These install verification procedures test the basic system functionality of Documents Xpress. Run the Administrator and Operator verification procedures from any workstation on the system network except where noted. Test Client verification procedures from a corporate client workstation.

Record all Pass / Fail results and provide a summary in the *Install Verification Record* at the end of this chapter.

1. Administrator Verification Procedures

The Administrator verification procedures test the major functions of a System Administrator using Documents Xpress.

1.1 Logging on as Administrator

Perform the following to log on as Administrator:

1. Open a browser window on a workstation connected to the network, or one of the Documents Xpress servers.
2. In the address line, type the IP address for the Documents Xpress server:

http:// <Documents Xpress server IP address>/xdx/admin

3. Type **admin** in the User Name text box.
4. Type the admin password **22222** in the Password text box and click **Log On**.

Verify that the log on was successful. If unsuccessful, please note the observed system response.

1.2 Adding a Printer

Perform the following to add a printer:

1. While logged on as Administrator, click **Printers**. From the **Manage Printers** drop-down menu chose **Add Printer**.
2. Type the **Printer Name**, **Server Address**, **Printer Location**, and **Printer Description** in the text boxes provided. Select and click **Add Printer** to save the printer data.
3. On the **Manage Printers** drop-down menu, click **View Printers**.

Verify that the added printer is displayed according to the definition just supplied. If unsuccessful, please note the observed system response.

1.3 Editing the User Interface Using Admin Tools

Perform the following to edit the user interface using the Admin tools:

1. Move to the Documents Xpress server and restore the **XDX Control Center** screen.

2. Click **Tools > UI Config**. From the **Configure Colors** drop-down menu, select **Main Page Text Color**.
3. In the **Current Color** text box type:

#0000ff
4. Click **Commit Changes** and type the Admin Username and Password if requested.
5. Open a web browser to verify that, after logging on, the welcome message has blue text.
6. Change the **Current Color** for the **Main Page Text Color** back to:

#000000
7. Click **Commit Changes** and type the Admin Username and Password if requested.
8. Click **File > Reload XML**. Click **Yes** to stop all processes and reload the XML file.
9. Click **1 > 2 > 3** to restart Documents Xpress and return to the Home page.

Verify that the changes were saved and UI updates are visible on the affected web pages. If unsuccessful, please note the observed system response.

2. Client Verification Procedures

The Client verification procedures exercise the major end user functions of Documents Xpress.

2.1 Registering a Client Account – Self Registration

Perform the following to register a client account:

1. Open a browser window on a workstation connected to the network, or one of the Documents Xpress servers.
2. In the address line, type the IP address for the Documents Xpress server:

http:// <Documents Xpress server IP address>/xdx

3. Click **Self Registration**.
4. Type a user name and a valid e-mail address. To send the registration request click **Continue**.
5. In the **Temporary Password** field, type the temporary password provided on the system generated e-mail.

Note: The temporary password will be e-mailed to the address entered in step 4. The password can also be located at the end of the Tomcat window in the XDX Control Center.

6. In the **New Password** and the **Verify Password** fields, type a new password.
7. To log on to Documents Xpress click **Finish**.

Verify that a system-generated e-mail was sent to the registering end user containing the assigned system password. If unsuccessful, please note the observed system response.

2.2 Logging on as a User

Perform the following to log in as an end user:

1. Close the browser window from procedure 2.1. Open a new browser window.
2. In the address line, type the IP address for the Documents Xpress server:

http:// <Documents Xpress server IP address>/xdx

3. Type the user name registered in procedure 2.1.
4. Type the registered password in the Password box. Click **Log On**.

Verify that the log on was successful. If unsuccessful, please note observed the system response.

2.3 Editing a User Profile

Perform the following to edit a user profile:

1. From the Home page, click **User Profile**.
2. Fill in or modify User Profile fields for the user.
3. Click **Update Profile**. Click **Finish** to save the updates.

Verify that the user profile updates were successful by clicking **Log Off**, logging back on as the same user, and selecting **User Profile** from the menu. If unsuccessful, please note the observed system response.

2.4 Submitting a Print Job Request – MS Word Document

Perform the following to submit an MS Word document print job request:

1. From the User Home page, click **Submit**.
2. Click **Browse**. Select any MS Word document and click **Open**.
3. Click **Next** to upload the MS Word document to the repository on the Documents Xpress server.
4. Type **Test description** in the **Description** text box. Click **Next**.
5. The recipients for the job appear. Click **Next**.

6. Type **These are special instructions** in the **Special Instructions** text box. Click **Next**.
7. The **Verify your order** window appears. Review the order and then click **Submit Order**. Wait for the screen to refresh.
8. Record the **Job ID** for this job. This Job ID will be required for test procedure 3.2. Click **Finish**

Verify that the submitted job was successful. If unsuccessful, please note the observed system response.

2.5 Submitting a Print Job Request – MS Excel Document

Perform the following to submit an MS Excel document print job request:

1. From the User Home page, click **Submit**.
2. Click **Browse**. Select any MS Excel document and click **Open**.
3. Click **Next** to upload the MS Excel document to the repository on the Documents Xpress server.
4. Select any print options for this document job. Click **Next**.
5. The recipients for the job appear. Click **Next**.
6. Type **These are special instructions** in the **Special Instructions** text box. Click **Next**.
7. The **Verify your order** window appears. Review the order and then click **Submit Order**. Wait for the screen to refresh.

Verify that the submitted job was successful. If unsuccessful, please note the observed system response.

2.6 Submitting a Print Job Request – Hard Copy Document

Perform the following to submit a hard copy document print job request:

1. From the User Home page click **Submit**.
2. Click **Hard Copy**.
3. Select the print options for this document. Click **Next**.
4. The recipient's window appears. Click **Next**.
5. Type **These are special instructions** in the **Special Instructions** text box. Click **Next**.
6. The **Verify your order** window appears. Review the order.
7. Click **Submit Order** to submit the print job order to the print shop. Wait for the screen to refresh.

Verify that the submitted job was successful. If unsuccessful, please note the observed system response

2.7 Editing the Personal Address Book

Perform the following to edit the Personal Address Book:

1. From the User Home page, click **Personal Address Book**.
2. Click **Add User**.
3. Fill in the fields with an imaginary user. When finished click **Add User**.

Verify that the new address was successful saved by clicking the name link of the user just added. Ensure the edits made were saved. If unsuccessful, please note the observed system response.

2.8 Editing the Document Repository

Perform the following to edit the Document Repository:

1. From the User Home page, click **Repository**.
2. Select a document from the repository. Select **Extend**. Click **Delete or Extend Document**.

Verify that the document selected for extension was extended from the repository. Typically, since there is just one document in the repository from these tests, the number of days remaining should not change. If unsuccessful, please note the observed system response.

3. Operator Verification Procedures

The Operator verification procedures test the major functions of an Operator using Documents Xpress.

3.1 Logging on as Operator

Perform the following to log on as Operator:

1. Open a browser window on a workstation connected to the network.
2. In the address line, type the IP address for the Documents Xpress server:

http:// <Machine2 IP address or URL>/xdx/admin

3. Type **operator** in the User Name text box.
4. Type the operator password **22222** in the Password text box and click **Log On**.

Verify that the log on was successful. If unsuccessful, please note the observed system response.

3.2 Editing a Client Job Request – MS Word Document

Perform the following to edit an MS Word document client job request:

1. From the Operator Home page locate the Job ID of the MS Word document previously submitted.
2. From the **Options** drop-down menu, choose **Edit Job**. Make some type of change to the job.
3. Click **Submit Edits**. The screen will refresh. Click **Finish**.
4. From the **Options** drop-down menu, choose **Inspect Job**.

Verify that the job properties were updated. If unsuccessful, please note the observed system response.

3.3 Fulfilling a Client Job Request – MS Word Document

A printer must already be added to the Documents Xpress system and the installer logged in as Administrator for this test to work.

Perform the following to fulfill an MS Word document client job request:

1. Using the job just edited in 3.2, from the **Options** drop-down menu, choose **Print Job**.
2. Under **Print Full Job**, select a printer from the drop-down menu.

3. Clear the **Skip Job Ticket** checkbox and click **Print**.
4. Click **Job Status**. Select **Succeeded** from the **Change Status to:** drop-down menu.
5. Click **Submit** to update the job status.
6. Click **Set Page Count** to confirm status change and update the page count if necessary.
7. Click **Job Status Page**.

Verify that the Job Status is **Succeeded**. If unsuccessful, please note the observed system response.

Note: If e-mail notification is activated, verify that the end user received an e-mail notification of job completion.

3.4 Fulfilling a Client Job Request – MS Excel Document

Perform the following to fulfill an MS Excel document client job request:

1. Using the job just edited in 3.2, from the **Options** drop-down menu, choose **Print Job**.
2. Under **Print Full Job**, select a printer from the drop-down menu.
3. Clear the **Skip Job Ticket** checkbox and click **Print**.
4. Click **Job Status**. Select **Succeeded** from the **Change Status to:** drop-down menu.
5. Click **Submit** to update the job status.

6. Click **Set Page Count** to confirm status change and update the page count if necessary.
7. Click **Job Status Page**.

Verify that the Job Status is **Succeeded**. If unsuccessful, please note the observed system response.

Note: If e-mail notification is activated, verify that the end user received an email notification of job completion.

3.5 Fulfilling a Client Job Request – Hard copy Document

Perform the following to fulfill a hard copy document client job request:

1. From the Operator Home page, locate the Job ID of the hard copy document previously submitted.
2. From the **Options** drop-down menu, click **Inspect Job**.
3. Click **Edit job ticket** to examine the job options selected for the hard copy document.
4. Print the job according to the client's print request.
5. On the Documents Xpress Operator page click **Job Status**. Select **Succeeded** from the **Change Status to:** drop-down menu.
6. Click **Submit** to update the job status.
7. Click **Set Page Count** to confirm status change and update the page count if necessary.

8. Click **Job Status Page**.

Verify that the Job Status is **Succeeded**. If unsuccessful, please note the observed system response.

Note: If e-mail notification is activated, verify that the end user received an e-mail notification of job completion.

3.6 Sending a Job to Each Installed Printer

Perform the following to send a job to each installed printer:

1. From the Operator Home page, locate any Job ID with status of **Received in Print Shop**.

Note: If there is no job with the status of **Received in Print Shop**, change the status of any job to **Received in Print Shop**.

2. From the **Options** drop-down menu, click **Inspect Job** to view the job properties.
3. Click **Print Job**.
4. Under the heading **Print Full Job**, select a printer from the drop-down menu.
5. Click **Print** to send the job to the selected printer.
6. Repeat steps 4 and 5 for each installed printer.
7. Click **Job Status**. Select **Succeeded** from the **Change Status to:** drop-down menu.

8. Click **Submit** to update the job status.
9. Click **Set Page Count** to confirm status change and update the page count if necessary.
10. Click **Job Status Page**.

Verify that the job was successful and all printers could print job requests. If unsuccessful, please note the observed system response.

Install Verification Record

Use the following section to record results of the installation verification procedures. Comments concerning failure observations are recorded at the bottom of each procedure the previous section.

Results

Record results using the following tables. Please describe what is observed if a procedure fails.

Administrative Functions

Test results for Administrative functions are recorded in Table A-4

Table A-4. Administrative functions and test procedures

Function	Test Procedure	Results P – Pass or F – Fail
Log on as Administrator	2.1.1	
Add Printers (Default and others in print shop)	2.1.2	
Edit User Interface Using Admin Tools	2.1.3	

Client Functions

Test results for Client functions are recorded in Table A-5.

Table A-5. Client functions and test procedures

Function	Test Procedure	Results P – Pass or F – Fail
Register Your Account	2.2.1	
Log on as End User	2.2.2	
Edit User Profile	2.2.3	
Submit Print Job Request – MS Word Document	2.2.4	
Submit a Print Job Request – MS Excel Document	2.2.5	
Submit a Print Job Request – Hardcopy Document	2.2.6	
Submit a File Conversion Job Request – PDF	2.2.7	

Table A-5. Client functions and test procedures (continued)

Function	Test Procedure	Results P – Pass or F – Fail
Submit a File Conversion Job Request – PostScript	2.2.8	
Edit Personal Address Book	2.2.9	
Edit Document Repository	2.2.10	

Operator Functions

Test results for Operator functions are recorded in Table A-6.

Table A-6. Operator functions and test procedures

Function	Test Procedure	Results P – Pass or F – Fail
Log on as Operator	2.3.1	
Edit a Client Job Request – MS Word Document	2.3.2	
Fulfill a Client Job Request – MS Word Document	2.3.3	
Fulfill a Client Job Request – MS Excel Document	2.3.4	
Fulfill a Client Job Request – Hard copy Document	2.3.5	
Send a Job to Each Installed Printer	2.3.6	

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