

Documents Xpress — Xerox Web Document Submission Software Version 2.0

Product Overview Guide

Version 2.0

Product Overview Guide

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

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1. Introduction

This chapter introduces you to the following topics:

- Audience for this guide
- Purpose and use of this guide
- · Conventions used in this guide
- Other reference documents for this software
- Training available for this software
- Prerequisite skills required to support this software

Audience for This Guide

The Documents Xpress — Xerox Web Document Submission Software Product Overview Guide is intended for personnel who require greater technical detail than exists in Documents Xpress marketing documents. This guide should enable you to gain an understanding of the technical and workflow elements of this software.

This guide was written for the following audiences:

- Decision makers at the customer site who may purchase this software
- Installation and support personnel for this software
- System administrators at the customer site
- Primary operators for this software at the customer site
- Xerox sales and marketing support personnel for this software
- Xerox technical support personnel

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Purpose and Use of This Guide

This guide provides the audience with the following information:

- An overview of the features and functionality of the software
- A generic workflow description of the software
- A list and description of the required software and hardware components
- A description of the configuration options
- An introduction to the roles and responsibilities, internal and external to Xerox, that are associated with the use and support of this software
- An introduction to the glossary of terms associated with this software

Conventions Used in this Guide

This guide uses the following conventions:

Document titles appear in italics.

Reference Documentation

The following is the list of additional documentation available for this software:

- Documents Xpress Xerox Web Document Submission Software Version 2.0 Installation Planning Guide – 701P37977
- Documents Xpress Xerox Web Document Submission Software Version 2.0 Installation and Configuration Guide – 701P37978
- Documents Xpress Xerox Web Document Submission Software Version 2.0 System Administration Guide – 701P37979

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 Documents Xpress — Xerox Web Document Submission Software Version 2.0 Product Overview Guide – 701P37980

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

Available Curriculum

The following training materials have been developed to support Documents Xpress. Attendance at or use of these courses is dependent on your use of, or your responsibilities in support of, this software. The courses are:

- Documents Xpress Xerox Web Document Submission Software Version 2.0 Product Overview Training – 701P37981
- Documents Xpress Xerox Web Document Submission Software Version 2.0 Operator / Administrator CBT Training
- Documents Xpress Xerox Web Document Submission Software Version 2.0 User CBT Training

Prerequisite Skills

Users of Documents Xpress require certain prerequisite skills before attending the training for this software.

System Administrator:

- A knowledge of TCP / IP and other network protocols
- A working knowledge of the Windows NT 4.0 Server or Windows 2000 operating system
- A working knowledge of the other Windows operating systems available at a customer site
- Familiarity with web browsers

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 A working knowledge of Hypertext Markup Language (HTML), Extensible Markup Language (XML), JavaServer Pages (JSP), and Structured Query Language (SQL)

Print Shop Operator / Administrator:

- A working knowledge of production printers in the print shop
- Detailed knowledge of scheduling and prioritizing print jobs
- Familiarity with web browsers

End Users:

- Familiarity with web browsers
- Familiarity with Windows applications

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2. Software Overview

This chapter introduces you to the following topics:

- Definition of Documents Xpress
- Software positioning
- Features and functionality of Documents Xpress
- Basic hardware and software configurations of Documents Xpress
- Roles and responsibilities required to use and support Documents Xpress at the customer site
- Workflows and processes for Documents Xpress

Definition of Documents Xpress

Documents Xpress allows end users to submit print jobs electronically using industry standard browsers for centralized production or decentralized print. If submitted to a production facility, 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 output quality, productivity, and turnaround time.

Software Positioning

Documents Xpress provides automation, integration, and speed, through web-based job submission, which improves the end-to-end time required for the delivery of documentation. Automation of the job submission process reduces errors and speeds up delivery of the product to the

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customer. The software adds value, improves quality, and reduces costs for customers.

Business Needs

Companies need to deliver documentation in a timely, cost-effective manner. Sometimes this documentation is a compilation from multiple sources and multiple formats creating logistical problems. Companies need access to information and documents anywhere and anytime. Company print centers must be accessible regardless of customer location.

Businesses require:

- Faster turnaround on critical revenue generating documents
- Consistent professional image and quality of deliverables, and corporate communications
- Better color reproduction, document re-purposing, and reprints
- Document management software synergistic with the need to contain and reduce costs
- Efficient electronic job submission to the production center
- Automated customer job tracking
- Tighter document production windows

Value Proposition to Customers

Documents Xpress offers:

- Submission of jobs via a web browser for improved productivity
- Electronic job tracking
- A print portal that provides efficient, effective communication with the print shop
- A user interface that is configured to customer requirements
- Document conversion services that facilitate web-publishing

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- Print shop storage of jobs in the Documents Xpress repository for easy resubmission of jobs
- Revenue generation through more efficient use and management of production facilities
- Better document quality and brand image
- Better Knowledge Worker productivity
- Cost containment
- Reduction of time-to-market for time-sensitive documents
- Improved configurable job tickets

Features and Functionality of Documents Xpress

Documents Xpress consists of the following features and functionality:

Highlighted New Features in Documents Xpress

- Improved performance and smaller footprint Documents Xpress now performs substantially faster than previous versions and occupies less memory and server space.
- **New Installer** A new streamlined installer eases Documents Xpress implementation.
- **User Registration** Documents Xpress Administrators can now easily add individual users and assign user rights from a new tool.
- **User Self-Registration** Users who are not pre-registered on Documents Xpress may request system access.
- New User Interface Users are guided through the process of submitting jobs by a new easy-to-use interface.
- Walk-Up Printing Services Print shop staff can now accept and process jobs from users who come to the print shop in person with

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either electronic or hard-copy originals. The Print shop staff can use their Documents Xpress administrator software to submit jobs as the walk-up user.

 New User Interface (UI) Customization Tool – A new tool, accessible through the Xerox Documents Xpress (XDX) Control Center, allows System Administrators to more easily customize the user interface.

Features in Documents Xpress

- Web-based Digital Job Submission Documents can be uploaded to the server using a web browser. Multiple documents can be submitted and managed as a single print order. Any document type may be submitted to the Documents Xpress system.
- Conversion Services Documents Xpress converts documents to print-ready PostScript files for submission to print shop printers. Adobe Acrobat Portable Document Format (PDF) files can also be converted to PostScript files.
- Job Specification Templates Administrators can establish, and users can choose from templates that define specific document options to simplify option choices for the user.
- Xpress Print Driver Documents Xpress features the powerful document submission enabler called the Xpress Print Driver (XPD). The XPD is installed and accessed just like any other print driver used in a given operating system.

Currently, this functionality allows the end user to produce a generic PostScript Level 2 file from any Windows 95 / 98 / ME, Windows NT 4.0, or Windows 2000 application. The XPD will automatically interact with the user's browser to create a new session of Documents Xpress. The XPD will then upload the documents, color or black and white, to the Documents Xpress server as a document selection. After

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logging on, the user is prompted for the assignment of job parameters in the Documents Xpress application. Finally, this PostScript Level 2 file can then be produced on any of the Adobe PostScript-interpreted printers in the production center.

- Online Electronic Job Ticket Document options and job options are selected online and submitted to the print shop as part of the electronic job submission.
- Job Status / History Documents Xpress depicts the current position of a job in a production workflow. Status is updated automatically by recognized events in the system, or manually by the print shop personnel. Jobs in progress are displayed in the Status category; completed jobs are displayed in the History category.
- Configurable Job Options All job ticket information that a user can assign to jobs in Documents Xpress is configurable.
- Job Options Edited by the Operator As part of the configuration process, all job ticket selections can be assigned as selections that can be edited by the Operator. This enables any authorized user in the production center to change the job ticket, if necessary. For example, an end user mistakenly submits a request for 1,000 copies instead of 100. When the user notifies the production center, the Print Shop Operator can modify the job ticket instead of canceling the job.
- Pass Through Printing Jobs submitted to Documents Xpress for printing will automatically be produced on the default printer (if only non-held options are chosen and documents are convertible to PostScript using conversion services). As part of the configuration process, all job parameters can be designated as held, to indicate the need for manual intervention.
- Job Resubmission Users can resubmit any print job currently in progress. When resubmitting a job, some or all of the document and job options can be modified before sending the job for printing. Once

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- a print job moves into the History category, the job parameters are no longer available and the job is not available for resubmission.
- Print Shop Production Documents Xpress supports Xerox production and non-production printers that are PostScript Level 2 compatible and capable of receiving jobs via Line Printer Remote (LPR) over TCP / IP.
- Proofing Documents Xpress allows the end user to view PDF renditions of certain documents through the web browser user interface. Documents Xpress also allows the user to request and approve a hard copy proof prior to authorizing the print job.
- Hard Copy Support Documents Xpress allows the end user to create and send an electronic job ticket for documents submitted as hard copy.
- Centralized Output / Production Center Jobs submitted through Documents Xpress are transferred to a centralized organization for production. Currently, all enterprise users can have worldwide access to the customer's Xerox Business Systems print shop facility via a simple user interface.
- Decentralized Output / Local Print Documents Xpress can be configured so users may print to any enabled printer within the customer's enterprise. Users can submit print jobs to office printers via the web interface without installing print drivers on their individual computers.
- Address Book Documents Xpress allows users to set up and maintain a list of names and addresses. These names can be selected as recipients for the delivery of submitted jobs. Features of the list provide the user with the ability to add, delete, and edit names. Users can access all registered users via the global address book. Global address book entries can be automatically copied to the user's address book.

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- Digital Document Repository Documents Xpress uses a digital document repository to store documents that have been submitted for production. Stored documents are easily accessible for selection in new jobs, on-screen viewing, and print production. Currently, private storage space is provided for each user. The number of days a file will remain in the repository before deletion is a configurable option. Users can extend the document storage to the default storage duration at any time.
- DocuShare Integration Modifications to DocuShare allow its users
 to submit documents directly to Documents Xpress via a submit
 button while in DocuShare. Registered users input job parameters
 and then submit the job to Documents Xpress. This feature enables
 software users access to the full document management capabilities
 of DocuShare such as group level file sharing and version control.
- Reporting Documents Xpress maintains a database of stored information derived from the job options and document options for each job. Administrators, using a Documents Xpress tool, can select and report on various functions of Documents Xpress.
 - Documents Xpress is capable of producing a file output, on a per job basis, of this job information. The file output can be used to feed an external accounting system or an Excel spreadsheet to facilitate account management including customer billing and charge back.
- Basic Pricing / Estimating (for end user) Users can check the
 estimated cost for a job before submission of the job. Administrators
 can now establish costs for any job parameter.
- User Interface Customization Tools Documents Xpress contains a series of administrator tools for customizing the user interface. Tools are available to support:
 - Inclusion of customer logos and banners in the header and footer portion of every web page

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- Use of the interface to convey marketing messages or service information to the end user in predefined areas
- Modification of interface look-and-feel such as colors and background images
- Enabling / disabling of optional functionality such as menu item selections
- User Profile Documents Xpress features an import utility that allows the System Administrator to populate the user profile information from a flat file output of any existing user database.

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Hardware and Software Requirements

Documents Xpress consists of a single server.

Hardware Requirements

The following are the **minimum** hardware requirements for Documents Xpress to operate:

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

Figure 2-1, on the following page, illustrates the layout of a generic Documents Xpress installation.

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Documents Xpress Example Documents Xpress Database and
Application Server

• MS Office Hardware Layout MySQL · Documents Xpress Application Adobe Acrobat Reader Web Server Apache Web Server
 Tomcat B and W Printer(s) Intranet Color Printer(s) Optional Client o ooooo oo Hardware Intranet Port 80 Client firewall (HTTP) Client Specific User GUI

Figure 2-1. Example Layout of Documents Xpress Hardware

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Server Software Requirements

Server Requirements

- Microsoft Windows NT Server 4.0 or Microsoft Windows 2000 Server
- Microsoft Office XP
- Adobe Acrobat Reader
- Documents Xpress software
- Internet Explorer 5.5 (or later) **or** Netscape Navigator 4.75 (or later)
- WinZip (or equivalent)

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 (or equivalent)

Pre-Installation Information Requirements

Information requirements for Documents Xpress are gathered in the *Documents Xpress* — *Xerox Web Document Submission Software Version 2.0 Installation Planning Guide*. Information required before installation includes:

- Internet Protocol (IP) address of the server
- The default drive letter for the server
- IP address and / or host name for the outgoing SMTP mail server that will allow anonymous logon

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- An administrative e-mail address for handling errors in the system and messages to users
- Printer names, queue names, and server IP addresses for all the printers to be added to the system
- Location and description of local printers for the Remote Printer feature
- Number of days documents should remain in the repository
- Optional DocuShare server IP address, DocuShare user name, and DocuShare password
- Optional Comma-delimited flat-file user

Roles and Responsibilities for Documents Xpress

Certain functions are required in order for Documents Xpress to operate efficiently. Depending on the size of the customer site, these functions can be performed by one person or by many people. The following section gives a description of the roles and responsibilities of each individual or function, whether the individual is internal Xerox support for the software or the individual is part of the support at the customer site.

Xerox Installer (Document Technology Specialist / Solutions Consultant)

The Xerox Installer is responsible for meeting with the decision-maker and the system administrator at the customer site to determine what hardware, software, or site modifications are required.

System Administrator

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

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- 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 billing and usage reports using Documents Xpress tools
- Load pricing data into Documents Xpress

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.

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User

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

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

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

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3. Software Components

This chapter contains information about the physical and logical components required to effectively operate Documents Xpress.

Physical Components

Documents Xpress depends on the proper installation and configuration of the following physical components:

- Network and computer hardware with accompanying network, server and client operating systems
- Documents Xpress server products and third-party software (such as Adobe Acrobat Reader, Microsoft Office XP, MySQL, Apache, and Tomcat)

Relationship of Physical Components

The physical components of Documents Xpress must be installed and configured in a certain order for Documents Xpress to operate. For example:

- A user cannot connect to the Documents Xpress server without a correctly installed and configured TCP / IP LAN or WAN (wide area network).
- Documents Xpress cannot function without its underlying repository.
 (Documents Xpress maintains its own repository system)
- The integration of the applications, which allow for conversion services, cannot function unless the applications, such as Microsoft Office XP and Adobe Acrobat Reader, are installed.

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Logical Components

Logical components are the pieces of Documents Xpress that are typically not hardware related. They are either software or human resource needs that are required to allow the software to operate as a whole.

The logical components of Documents Xpress are:

- Software components
- Documents Xpress software components

Software Components

Documents Xpress software

Documents Xpress software allows browser-based access to a print shop job submission.

Documents Xpress software components

Logically, these user functions make up the software component of a typical Documents Xpress installation:

- Documents Xpress Print Shop Administrator
 Documents Xpress Print Shop Administrator allows
 browser-based access for print shop administrators to manage
 incoming print jobs, configure printers, and generate reports using
 Documents Xpress tools.
- Documents Xpress Print Shop Operator
 Documents Xpress Print Shop Operator allows browser-based access for print shop operators to manage incoming print jobs.

Documents Xpress User

Documents Xpress User allows browser-based access for users to electronically submit and resubmit print jobs and track job progress.

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4. Processes and Workflow

The processes and workflow used to operate Documents Xpress will vary at each customer site. The workflow and process described in this guide deal with the generic version of Documents Xpress. Consult with your Xerox analyst to customize this workflow and process to optimize the needs of your site.

Processes

Documents Xpress can be divided into the following processes as shown in Figure 4-1:

Figure 4-1. Types of processes available in Documents Xpress

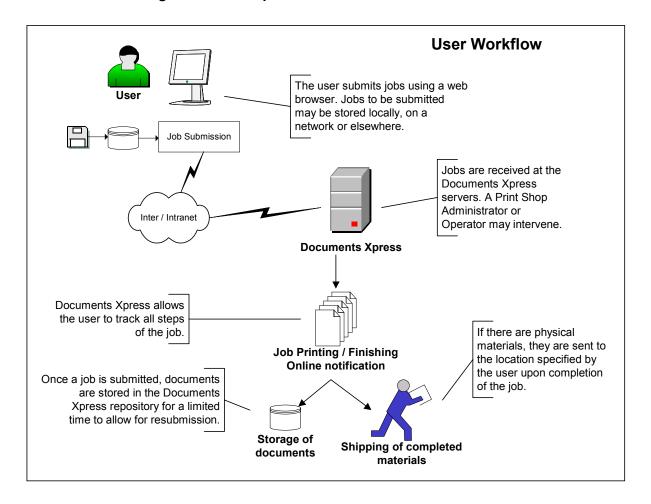
| Printing Processes | Conversion Processes * |
|---|---|
| Print Shop – using the Documents Xpress interface to submit jobs to the print shop | Document to Portable Document Format (PDF) – conversion of source documents to PDF |
| Xpress Print Driver (XPD) – using the XPD to submit jobs | To PostScript (PS) – conversion of source documents to PostScript format |
| Local Print – printing to networked printers outside of the print shop facility, typically within a user's building | PDF to PS – conversion of PDF documents to PostScript format |
| Print Job Resubmission – resubmitting print jobs instead of recreating them | * Note: Conversion processes are not directly accessible to end users. |

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Workflow

Example workflows for Documents Xpress are shown in the following figures, Figures 4-2, 4-3, 4-4, 4-5:

Figure 4-2. Example workflow for Users



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Print Shop Administrator Workflow Jobs are received at the Documents Xpress 2.0 servers. A Print Shop Administrator or Operator Inter / Intranet may intervene. **Documents Xpress Print Shop** Template and **Printer Setup Administrator Report Creation** The Print Shop Administrator has all the rights of a User and the Print Shop Operator. The Print Shop Adminstrator sets up printers and creates templates and reports.

Figure 4-3. Example workflow for Print Shop Administrator

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Print Shop Operator Workflow Jobs are received at the Documents Xpress servers. A Print Shop Administrator may Inter / Intranet intervene. **Documents Xpress** Production Printer 1 Production Shipping of completed Printer 2 materials **Print Shop** Operator Production The Print Shop Operator has all Printer 3 the rights of a User. The Print Storage of Shop Operator receives, documents approves, and sends jobs to printers based on the needs of the particular job. Once a job is submitted, documents are stored in the Documents Xpress repository for a limited time to allow for resubmission. If there are physical materials, they are routed to the location specified by the user upon completion of the job.

Figure 4-4. Example workflow for Print Shop Operator

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System Administrator Workflow The System Administrator may be responsible for a single installation, or multiple print shop installations, Inter / Intranet of Documents Xpress. **Documents Xpress Print Shop** User / Operator **System Maintenance** Administrator UI Customization Rights The System Administrator sets up and maintains users, user groups, and permissions. The System Administrator is also responsible for Documents Xpress system maintenance and customizing the user interface.

Figure 4-5. Example workflow for System Administrator

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5. 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.

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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.

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A. Glossary

Database A set of interrelated files created and managed by a DBMS

(database management system). Any electronically stored

collection of data is also considered a database.

Database server A computer in a local area network (LAN) dedicated to

database storage and retrieval.

DBMS A database management system is a collection of programs

that allow the storage, retrieval, and modification of

information from a database.

IP address Internet Protocol address is a means to identify computers

and devices on a network.

LAN A Local Area Network (LAN) is a communications network

that serves users within a confined geographical area. A LAN generally includes servers, workstations, a network

operating system, and a communications link.

PostScript A page description language developed by Adobe Systems.

It is an industry standard language for printing primarily on

laser printers.

Repository A central location where a collection of electronic data is

stored and maintained in an organized way.

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SMTP Simple Mail Transport Protocol (SMTP) is a protocol to send

e-mail messages to different servers. In Documents Xpress, access to a SMTP mail server is required to allow users who register on the system to receive temporary passwords.

register on the system to receive temporary passwords.

TCP / IP Transmission Control Protocol / Internet Protocol (TCP / IP)

is a communications protocol developed for the Defense Advanced Research Projects Agency (DARPA) to allow

dissimilar systems to network together.

WAN A Wide Area Network (WAN) is a communications network

that serves users in a large geographic area. Typically, a WAN consists of two or more LANs. The largest WAN in

existence is the Internet.

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