Xerox® Workplace Suite Installation Guide

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Introduction

This chapter contains:

This document provides the details required for Xerox® Workplace Suite Mobile Printing Workflow, Print Management Workflow, and Content Security Workflow. It is intended to define your roles and responsibilities and those of Xerox to assure a successful installation.

Xerox® Workplace Suite Mobile Printing Workflow Software Overview

The Xerox® Workplace Suite Mobile Printing Workflow Basic and Premium Software allows users to print office documents, photos, and print-ready files such as PDF, TIFF, and more, using a mobile device. Users can submit documents using either email or the Xerox® Workplace Mobile App, with the ability to select various printing options. You can print documents immediately, or for sensitive content, you can release documents at the printer using a system-generated code. These abilities are accomplished without the need for print drivers or special software.

The Xerox® Workplace Suite Mobile Printing Workflow Software works with Xerox printers, both EIP-enabled and non-EIP enabled, and non-Xerox Printers. You can use various methods to submit and upload files, and print documents. Xerox® Extensible Interface Platform® (EIP) is a software platform inside many Xerox multifunction printers. The EIP software enables personalized and customized solutions that are accessible from a printer touch screen.

Print documents immediately:

- Using your mobile device, select a document. Use the Open-With or Open-In Xerox® Workplace Mobile App. Select your printer and print options, then select **Print**.

- Using the name or IP address of your printer in the subject line, send an email to the Xerox® Workplace Suite Mobile Printing Workflow Software. Your document and email body prints automatically.

Mobile Print Workflow Document Conversion Options:

- **Built In Document Conversion print engine** - The default conversion engine when Microsoft® Office is not installed.

- **User-Supplied Copy of Microsoft® Office 2016** - You can use Microsoft® Office 2016 as your document conversion engine by installing your own licensed version of Microsoft® Office 2016 Professional.

- **Premium Conversion Engine** - The Xerox® purchasable conversion engine that utilizes Microsoft® Office 2013.

Upload documents to print later:

- Send an email with your office documents or photos to the Xerox® Workplace Suite Mobile Printing Workflow Software incoming email address.

- Use the Document upload feature in the Xerox® Workplace Mobile App.

- Send documents from your workstation to the Mobile Printing Incoming Print Queue.

Print uploaded documents:

- From the Xerox® Workplace Mobile App.

- From a Workplace Suite Print Client-EIP-enabled device.

Xerox® Workplace Suite Print Management Workflow Overview

Xerox® Workplace Suite Print Management Workflow allows access control to Xerox multifunction printers that have Convenience Authentication (CA) capability. Users can gain access to the multifunction printer using card swipe or other alternative login methods including LDAP credentials, Primary PIN Number, and Access Card Number, a personal, random confirmation number that is emailed to each user.

The Xerox® Workplace Suite Print Management Workflow supports submitting documents for immediate release to the device, and submitting documents to a print queue for later release at the device.

Print Management supports various print architectures:

- A centralized printer server where print jobs are held on a Workplace Suite server while awaiting release.

- A local client based print model where jobs are held on your computer while awaiting release.

- A Direct Print path where jobs are submitted directly to a printer for immediate release.

Your System Administrator will decide which architecture is best suited for your environment. The steps required to prepare your computer for printing to Print Management will vary based on the print architecture selected by your administrator. The Xerox® Workplace Suite Print Management Workflow works with both Xerox® and non- Xerox® devices. For Xerox devices with Xerox Extensible Interface Platform® (EIP) capability, Print Management supports an identification card based authentication and an EIP application that allows you to choose which jobs you want to print. For non-Xerox or non-EIP capable devices, Print Management allows you to automatically print your jobs by swiping your identification card.

Xerox® Workplace Suite Content Security Workflow Overview

The Xerox® Content Security Workflow identifies labeled electronic or paper business documents to help restrict distribution and use. Some business documents are labeled for operational, legal, financial, or historical purposes. Document labels can include phrases such as `For Internal Use Only` or `Business Confidential`. Tracked documents can include intellectual property, business decisions, transactions, or future product information.

When you enable the Content Security Workflow, you can create global content profiles, and set search strings to track documents that are sent to print. Content Profiles consist of one or more user-defined search strings. Submitted print jobs are searched for matches to an existing Content Profile. When a match is found, email alerts are sent to a list of recipients, and the job is logged in the Job History. You can configure the Content Security Workflow to save a copy of each matched document to a designated Content Security Storage location.

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Xerox® Workplace Suite Overview

This chapter contains:

This document includes a brief description that the System Administrator should consider before beginning the installation of Xerox® Workplace Suite.

Documentation and Online Support

Xerox® Workplace Suite Support

The following document is included on your Xerox® Workplace Suite Solution DVD:

- **Xerox® Workplace Suite Installation Guide** - Contains pre-installation requirements and software install procedures.

Documents available online:

- **Xerox® Workplace Suite Administration and Configuration Guide** - Contains information on configuration settings, licensing, and security.
- **Xerox® Workplace Suite Printer Client User Guide** - Contains information on how to send, retrieve, and print a job and use the enhanced Mobile Printing email submission features. These features are only available with select Xerox EIP-enabled devices.
- **Xerox® Workplace Mobile App Quick Start Guide** - Contains information on how to start using the Xerox® Workplace Mobile App.
- **Xerox® Workplace Suite Troubleshooting Guide** - This guide is available as a download only.
- **Xerox® Workplace Suite Print Management Workflow User Guide** - Contains information on using Print Management Authentication, Print Release, the Workplace Suite Client, and the Printer Client.
- **Xerox® Workplace Suite Content Security Workflow Guide**- Contains information on enabling and using the security-related features of Xerox® Workplace Suite Content Security Workflow.

The most up-to-date documentation is available at: www.support.xerox.com/support/xerox-workplace-suite

To access the Xerox® Workplace Suite customer support forum, refer to: http://forum.support.xerox.com

Installation Considerations

Xerox® Workplace Suite Installation Options

To get started with Xerox® Workplace Suite, choose one of the following options:

- For new installations: Refer to the *Xerox® Workplace Suite Installation Guide* and the *Xerox® Workplace Suite Administration and Configuration Guide*.

- For existing installations that have Xerox® Mobile Printing Solution or Print Management Software: Refer to the *Xerox® Workplace Suite Upgrade Guide for Print Management and Mobility Suite, Mobile Print, and PrintSafe*.

There are three Workplace Suite primary workflows.

- Print Management Workflow: This workflow is for printer authentication and desktop print job submission for later printing.

- Mobile Printing Workflow: This workflow is for print job submission and release from mobile devices, email, and so on.

- Content Security Workflow: This workflow is for Jobs that are printed or scanned, then parsed for keywords or phrases defined in custom profiles.

The Workplace Suite Workflows are delivered in different ways:

- If you plan to use the Print Management Workflow only: The Workplace Suite Kit includes the license for the software only. You can install software from a downloaded package from www. xerox.com.

- If you plan to use the Mobile Printing Premium Workflow: The Workplace Suite Kit contains the Mobile Printing Workflow license and software DVD, and a Microsoft®Office Activation key.

- If you plan to use Mobile Printing Basic, or your own copy of Microsoft® Office 2016 Professional: The Workplace Suite Kit contains the Mobile Printing Workflow license. You can install software from a downloaded package from www.xerox.com.

- If you plan to use the Content Security Workflow: A Mobile or Print Management Workflow license is required. The kit includes the license for the software.

System Installation Considerations

The Workplace Suite supports advanced configurations, which can handle a large user base where many jobs are submitted simultaneously. To configure the solution for these types of advanced configurations, please contact authorized Xerox personnel for further details.

Information on many of the configuration options can be found in the Xerox® Workplace Suite Administration and Configuration Guide.

Database Requirements

On installation, the Administrator must choose between a local (MS SQLCE) and an external (MS SQL Server) database.

- The local database is a file on a disk and does not require any additional software.
- The external database requires a separate SQL server. An external database is recommended if more than 10,000 users are expected to be created/imported into the system.

    🖉   **Note:** An external database is typically faster (although under 10,000 users the difference is negligible) and more maintainable in terms of backup and size.

Federal Information Processing Standards (FIPS-140) Support

    🖉   **Note:** FIPS mode requires a new installation of Workplace Suite 5.0 software.

- FIPS must be enabled on the server before installing Workplace Suite.
- Upgrading from earlier versions of the software, 4.x or earlier, and then enabling FIPS mode is not supported.
- To enable FIPS, refer to the Microsoft online Instructions for enabling FIPS on your server.

Print Management Workflow Installation Considerations

Xerox® Workplace Suite, when used with the Xerox Workplace Suite Print Management Workflow, offers the ability to use Authentication access of Xerox Multifunction Printers, and Print Release control of print jobs to a wide variety of printers. There are a number of choices to be made in the overall configuration of the Workplace Suite system concerning how the system will work best in your specific environment. While these choices can be changed after the original installation, the user experience will also change, so the best practice recommendation would be to consider the following issues carefully before installing and configuring Workplace Suite for the Print Management Workflow for the first time.

Incoming Print Queues

The Xerox® Workplace Suite Print Management Workflow supports two types of Incoming Print Queues:

Pull Print Network Queue

A Pull Print Network Queue is a traditional, shared print queue that is hosted on a print server. Users can print to this print queue and jobs are stored on the server. Users can release the jobs later, at the control panel of a specified device.

A Pull Print Network Queue is the recommended configuration for most installations and are easy to deploy. Ensure that the shared print queue is installed on user personal computers. A Pull Print Network Queue is recommended for environments where mobile PCs or tablets are in use. Users are not required to be online when print jobs are released.

This model is not recommended for limited-bandwidth environments. Specifically, the bandwidth between the personal computer and the Print Server, or between the Print Server and printers on the network. All job data is sent from user personal computers to the Workplace Suite Print Server for submission. Job data is sent from the Workplace Suite Print Server to the printer for release. Poor network performance can cause delays during job submission and release for print.

Pull Print Client Queue

A Pull Print Client Queue is a queue where all the print processing is performed locally. Print jobs are stored on the personal computer for each user. Pull Print Client Queues typically have better performance in environments where network bandwidth is limited between user personal computers and the print server. Each user is required to install the Print Management client on their workstation, either through a manual install or through an SCCM push. After the client is installed on the workstation, print jobs are held on the system of the user until print release from the Printer Client or Print Portal App. Network traffic between the Workplace Suite server and client is confined to message traffic, not the full print spooling. At the time of a print-release request, the client workstation must be online and connected to the Workplace Suite server.

Print Servers

For the default installation, all Xerox® Workplace Suite Print Management Workflow components, including the Print Server, are installed on the same physical server. This installation is sufficient for most small to mid-size enterprises. For larger installations that include multiple geographical sites or buildings, additional print servers can be added.

Additional Print Servers are added to the Workplace Suite system by installing but not licensing the Workplace Suite software on one or more additional servers, including the creation of one or more print queues on these servers and then associating the additional Print Servers with the primary Xerox® Workplace Suite Server by following the instructions on Print Queues in the Xerox Workplace Suite Administration and Configuration Guide.

Print Drivers

Whenever a client or network print queue is created, an appropriate print driver must be selected. The type of driver determines the actions that a user can carry out on documents submitted. The Xerox® Workplace Suite Print Management Workflow will attempt to allow a user to change the color, sides printed, and/or copy count on a document prior to release.

In general, you should try to use the manufacturer's print driver designed for the printer(s) associated with that print queue. For Xerox devices, either the Xerox Global Print Driver or the Xerox® Pull Print Driver is recommended. The Pull Print driver is recommended if you have a mixed set of Xerox devices associated with that print queue; check the list of supported devices for the Xerox® Pull Print Driver at

www.xerox.com. If your site has a mixture of Xerox devices and other manufacturer devices, it is best to have these devices separated into different print queues so that the appropriate print driver can be used. If your site has primarily a single type of device, the recommendation would be to use a device specific driver for the print queue.

Network Appliances (External Card Readers)

Print Release for devices that are not locked using Xerox® Convenience Authentication can be completed using an external card reader plugged into a network appliance. Three different network appliances are supported by the Xerox® Workplace Suite Print Management Workflow:

- Elatec TCP Conv

- Elatec TCP Conv2

- RF Ideas Ethernet 241

The network appliances and external card readers are available in two basic types:

- Network Address Translation (NAT) appliances

- Independent network appliances.

A NAT appliance will sit between the printer and the network and takes on the printer's IP address. The printer will take on a private IP address behind the card reader. The card reader will be plugged into the network appliance rather than into the printer. The NAT appliance has very low administrative overhead as the combination of appliance and device will be mapped to the Xerox® Workplace Suite administration page as a printer.

🖉 **Note:** The Elatec TCP Conv2 is a NAT appliance.

The Elatec TCP Conv and RF Ideas Ethernet 241 are independent network appliances and will have a separate IP address from the printer they control for Print Release. Both the network appliance and the printer will be added individually to the Xerox® Workplace Suite administration page where they can be associated together.

🖉 **Note:** These readers are only recommended in networks with stable IP addresses.

The RF ID Ethernet 241 is the only network appliance that supports transport encryption.

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Installation Overview

This chapter contains:

If you are performing an upgrade installation or software reinstallation, refer to the *Xerox® Workplace Suite Upgrade Guide for Print Management and Mobility Suite, Mobile Print, and PrintSafe* available at support.xerox.com/support/xerox-workplace-suite.

Before you start the installation, verify that all items on this list are addressed.

1. To gather the information needed for the installation, review the System Requirements for the Xerox® Workplace Suite Software section with the local System Administrator.

2. Check that you have all the information required to enable a successful installation. For a checklist, refer to the Essential Configuration Information section.

3. Verify that the server, or virtual server, meets or exceeds the minimum solution requirements. For solution requirements, refer to the System Requirements for the Xerox® Workplace Suite Software section.
   - A static, registered IP address is required to install a DNS server.
   - If a Windows domain is required, before installation, add the server to the Microsoft Active Directory Domain.
   - If you are using a virtual server, a static MAC address is required because licensing is tied to the MAC address.

4. Ensure that the operating system language for the server is one of the supported languages listed in the System Requirements for the Xerox® Workplace Suite Software section.

5. Ensure that the person who performs the solution software installation uses an account that has administrative rights on the server.

6. If you are utilizing the Mobile Print Workflow and intend to use your own copy of Microsoft® Office 2016, install Office before installing the Workplace Suite software.

7. If you are using Xerox® Workplace Suite Mobile Printing Workflow Premium, Microsoft® Office is installed automatically during the installation process. Remove any version of Microsoft® Office currently installed on the server before installing the Workplace Suite software..

System Requirements for the Xerox® Workplace Suite Software

The following table lists the minimum system requirements required for installing the Xerox® Workplace Suite software.

🖉 **Note:** Installation on a dedicated server or virtual machine (VM) is required for the Xerox® Workplace Suite software.

System	Activity Check-Off	Requirements
Workplace Suite Server: Supported operating systems	☐	It is recommended to install Xerox® Workplace Suite on Windows® Server-based operating systems. Ensure that you install only the 64-bit versions of the following operating systems: • Windows® Server 2019 • Windows® Server 2016 • Windows® Server 2012 R2/Windows Server 2012 • Windows® Server 2008 R2 SP1 • Windows® 10 Pro Before you install the Workplace Suite software, ensure that your current operating system software is up to date. • To verify which operating system is installed, select **Control Panel→System and Security→System**. • If your system is missing any Service Packs or updates, go to the Microsoft Support website. Download and install the needed files. After you install the updates, you are ready to install the Xerox Workplace Suite software.
Workplace Suite Client: Operating systems supported by the Print Management Workflow	☐	• Windows® 7 • Windows® 8.1 • Windows® 10 🖉 **Note:** Server operating systems are not supported.
Supported browsers	☐	• Internet Explorer 11 and later • Firefox • Chrome
Supported server languages	☐	English, French, Italian, German, Spanish, Dutch, and Brazilian Portuguese 🖉 **Note:** If your language is not listed, by default, the English version of Microsoft Office is installed.
Customer Supplied Microsoft Office	☐	Version: Microsoft Office 2016 Professional Languages: English, French, Italian, German, Spanish, Dutch, and Brazilian Portuguese

System	Activity Check-Off	Requirements
		✎ **Note:** If your language is not listed, install the English version of Microsoft Office.
Supported end-user languages	☐	English, French, Italian, German, Spanish, Dutch, Brazilian Portuguese, Czech, Russian, and Polish ✎ **Note:** End-user languages are used for Email Notifications, the Printer Client, the Print Management Client, and the User Portal.
Processor	☐	Required: Single (1) Intel Core Quad CPU at 3.0 GHz Recommended: Dual (2) Intel Core Quad CPUs at 3.0 GHz ✎ **Note:** If you are using multiple Xerox® Workplace Suite Workflows in large installations, a fast Quad core server-based processor is recommended.
RAM	☐	• Recommended: 8 Gbytes of RAM • Large Installations: 16 Gbytes of RAM ✎ **Note:** When using multiple Xerox® Workplace Suite workflows, 16 Gbytes of RAM is recommended.
Hard drive	☐	• Capacity: 160 Gbytes or higher, with at least 100 Gbytes of available space on the hard drive • Capacity for large installations: 160 Gbytes or higher, with at least 250 Gbytes of available space on the hard drive ✎ **Note:** If Content Security storage is enabled, additional hard drive space is required.
Optical drive	☐	DVD drive for Mobile Printing Workflow Premium installation only
Display	☐	Monitor: 1024 x 768 or higher DPI resolution
Network	☐	• Protocol: TCP/IP • Static IP registered in a DNS server • Speed: 1 Gbyte is recommended • Internet access
Mail protocols	☐	• Internet Message Access Protocol (IMAP) • Simple Mail Transfer Protocol (SMTP) • Microsoft Exchange Web Services • Post Office Protocol 3 (POP3) • Lotus Notes Remote Procedure Call
Database	☐	• Microsoft SQL Server 2014 Express is the default. If any of the following conditions exist in your current environment, use an external SQL database: • Supporting 10,000 or more Xerox® Workplace Mobile App users • Supporting more than 10,000 LDAP accounts • Requiring Enterprise failover installation to safeguard data

System	Activity Check-Off	Requirements
		For external database requirements, refer to the *Xerox Workplace Suite Installation Guide*, and the *External SQL Database Appendix*.
Supported print drivers for Print Management Workflow Incoming Print Queues	☐	• v3 Full-featured software: PostScript, PCL 6 • Non-Xerox print drivers
LDAP (optional)	☐	• Microsoft Active Directory supported • When supporting more than 10,000 LDAP accounts, use an external SQL database
Additional Required software	☐	To complete server configuration and installation, follow the software manufacturer instructions for the software packages: • Microsoft .NET Framework 4.7.2 • Internet Information Services (IIS)
Additional software	☐	To convert OpenOffice documents, install Apache OpenOffice 4.1.1. software • Apache OpenOffice software versions earlier than version 4.1.1 are not supported. • If you install Apache OpenOffice software, restart the Xerox® Mobile Printing DCE Service, or perform a system restart.

🖉 **Note:** By default, the Xerox® Workplace Suite software supports creating and using a local database that resides on the same server that runs the Workplace Suite. If an external database or database cluster is required for failover, Workplace Suite supports the configuration.

Essential Configuration Information

As part of the solution installation, you will be asked to supply a variety of network configuration information. Before starting the software installation, use the checklist below to gather the information you will need during the installation process.

It is highly recommended that you configure the following with sufficient time so that all connections and addresses are operational at the time the software is installed:

- Incoming Mail Server (Mobile Printing Workflow Only)
- Outgoing Mail Server
- Receiving Reply-to and From Email Addresses

Email Server Information

Complete these tables and have them ready when the software is installed. Refer to the "Company" chapter in the Xerox® Workplace Suite Administration and Configuration Guide for full descriptions of each item.

ⓘ **Important:** Ensure that Incoming Mail Server, Outgoing Mail Server, and the Receiving, Reply-to, and From email address are configured before the software is installed. This ensures that all connections and addresses are operational at installation time.

Incoming Mail Server Information (Mobile Printing Workflow Only)	
Incoming Email Server Type Examples: POP3, IMAP or Microsoft Exchange Web Services	
Incoming Mail Server name For example: sample.host.name	
Incoming Mail Server Port For example: 110	
Username For example: admin	
Password (for the above username)	
Use Secure Connection (SSL)? If yes, what type?	

Outgoing Mail Server Information	
Outgoing Mail Server (SMTP) For example: sample.host.name or IP address	
Outgoing Mail Server Port For example: 25	

Outgoing Mail Server Information	
Outgoing Mail Server Requires Authentication? If yes, then add the Username and Password information below for the server.	
Server Username	
Password (for the above username)	
Use Secure Connection (SSL)? If yes, what type?	

Email Addresses	
Receiving Email Address For example: mobileprinting@email.com or printmanagementsupport@company.com The Receiving Email Address is the email account the server will be monitoring for incoming jobs (emails). This email address must be unique to the Mobile Printing Workflow software.	
Reply-to Email Address For example: replyto@email.com The Reply-to Email Address is the email address an end user will see and use when selecting "Reply-to" after receiving the confirmation email sent by the server. This should be used for "Customer Service" or "Technical Support" purposes.	

Email Addresses	
From Email Address For example: from@email.com The From Email Address is the address that an end user sees in the "From" area when they receive a confirmation email from the Mobile Printing Workflow server.	
Support Email Address For example: mpadmin@email.com The Support Email Address is the address used by the Xerox®Workplace Suite server to send an email in the event that the server address changes. This email should be to the system administrator in charge of the server.	

Printer Information

You will need the following information about each Multifunctional Printer (MFP) that you want to use with the software. The IP Address or Host Name is required for each printer. For more information on advanced printer setup refer to the Xerox® Workplace Suite Administration and Configuration Guide.

- Printer IP Address or Host Name
- Username and Password
- SSL (true/false)
- GET Community Name
- SET Community Name
- PDL Type

Server Preparation

Select the Windows operating system below that the software will be installed on; follow the instructions to enable IIS and .NET components and to configure Windows Firewall settings.

Windows Server 2008 R2

Before you install Internet Information Services (IIS), ensure that the Print Spooler service is running, and is set to Startup Type: **Automatic**.

1. Go to Windows Services by selecting **Start→Administrative Tools→Services**.

2. Select the **Print Spooler** service.

3. Validate that the Print Spooler Service is **Running**.

4. Select **Automatic** for Startup type.

Installing Internet Information Services (IIS) for Windows Server 2008 R2

1. Download then install Microsoft .NET Framework 4.7.2 or greater.

2. Click **Start→Administrative Tools→Server Manager**.

    The Server Manager window opens.

3. In the left pane, double-click **Roles**.

    In the right pane, the Roles window appears.

4. In the right pane, click **Add Roles**.

    The **Add Roles Wizard** appears.

5. If a Before You Begin pane appears, to move to the Select Server Roles pane, click **Next**.

6. On the Select Server Roles pane, select **Web Server (IIS)**, then click **Next**.

    The Web Server (IIS) Introduction to Web Server (IIS) window appears.

7. Click **Next**.
    The Select Role Services window appears.

    💡 **Tip:** The remainder of this procedure includes verifying the selected Role Services options or selecting the options as required.

    ✏️ **Note:** These options/items are listed in the order displayed as you move down the Role Services list.

8. To select the common HTTP features, select **Web Server→Common HTTP Features**, then select the following options as required:
    *   **Static Content**
    *   **Default Document**
    *   **Directory Browsing**
    *   **HTTP Errors**

9. To select application development, select **Web Server→Application Development**, then ensure that you select the needed options.

10. To select health and diagnostic features, select **Web Server→Health and Diagnostics**, then select the following as required:
    - **HTTP Logging**
    - **Request Monitor**

11. To select security settings, select **Web Server→Security**, then select the following as required:
    - **Basic Authentication**
    - **Windows Authentication**
    - **Digest Authentication**
    - **Request Filtering**

12. To select file compression, select **Web Server→Performance**, then select **Static Content Compression**.

13. For Management Tools, select the following as required:
    - **IIS Management Console**
    - **IIS Management Scripts and Tools**
    - **Management Service**

14. To manage compatibility, select **Management Tools→IIS 6 Management Compatibility**, then select the following as required:
    - **IIS 6 Metabase Compatibility**
    - **IIS 6 WMI Compatibility**
    - **IIS 6 Scripting Tools**
    - **IIS 6 Management Console**

15. If you added role services, to move to the Confirm Installation Selections window, click **Next**. To add the new role services, click **Install**.

    Note: If you did not add any role services, click **Cancel** and then **Yes** to complete the IIS verification.

16. To complete the IIS installation process, click **Close**.

17. Go to Configuring Windows Firewall.

Windows Server 2012 R2 / Windows Server 2012 / Windows Server 2016 / Windows Server 2019

Before you install IIS, ensure that the Print Spooler service is running, and is set to Startup Type: Automatic.

1. Go to Windows Services by selecting **Server Manager→Local Server→Tools→Services**. On the right panel, Services are displayed.

2. Select the **Print Spooler** service.

3. Validate that the Print Spooler Service is running and set to **Automatic**. If not, go to **Services** and change the setting to **Automatic**.

Installing Internet Information Services (IIS) for Windows Server 2012 R2, Windows Server 2012, Windows Server 2016, and Windows Server 2019

Note: Before you start the preinstallation process, access is required to the Windows Server 2012 Installation Media or Files.

1. Download, then install .NET 4.7.2 or greater.

    🖉 **Note:** This installation is not required for Server 2016 or 2019.

2. Open the **Server Manager**.

3. From the upper-right menu, select **Manage**, then select **Add roles and features**.

    The Add roles and features Wizard appears, then the Before You Begin window appears.

4. To move to the Select Server Roles window, click **Next**.

5. At the Installation type window, select **Role based or feature based installation**.

6. At the Server Selection window, select **Select a server from the server pool**.

7. From the Server Pool list, select the Mobile Printing server name, then click **Next**.

8. At the Select Server Roles window, select **Web Server (IIS)**. Click **Add Features**.

9. Click **Next** three times.
    Ensure that on the third click, **Role Services** is highlighted on the left side of the wizard.

10. At the Role Services window, ensure that the following items are selected:

    🖉 **Note:** If you select an item, the Add Features that are required window appears. Select **Add Features** to include the following features.

    *   **Web Server → Common HTTP Features**
        *   **Default Document**
        *   **Directory Browsing**
        *   **HTTP Errors**
        *   **Static Content**
    *   **Web Server → Health And Diagnostics**
        *   **HTTP Logging**
        *   **Request Monitor**
    *   **Web Server → Performance**
        *   **Static Content Compression**
    *   **Web Server → Security**
        *   **Request Filtering**
        *   **Basic Authentication**
        *   **Digest Authentication**

- **Windows Authentication**
- **Web Server → Application Development**
    - **Select all features except ASP.NET 3.5 and .NET 3.5 Extensibility**
- **Management Tools**
    - **IIS Management Console**
    - **IIS 6 Management Compatibility**
        - **IIS 6 Metabase Compatibility**
        - **IIS 6 WMI Compatibility**
        - **IIS 6 Scripting Tools**
        - **IIS 6 Management Console**
    - **IIS Management Scripts and Tools**
    - **Management Service**

11. After you select all the featured items, click **Next**.

    ⊙ **Important:** To avoid a feature-installation timeout error, select **Specify an alternate source path**, then provide the path to the files. To provide the path information, follow the onscreen instructions. Ensure that you provide the drive letter and full path to the source files location.

12. Verify that you added the required role services.

13. Click **Install**.

14. When the installation is complete, click **Close**.

15. Close the Server Manager window.

16. To continue, go to the section Configuring Windows Firewall

Windows 10

Prior to installing and configuring Internet Information Services (IIS), use the steps below to ensure that the Print Spooler Service is running and its startup type is **Automatic**.

1. Press the **Windows key + the R key (Win+R)** to open the Run window.

2. In the Run window, type `services.msc` in the Search field, and press the **Enter** key.

    The Windows Services console opens.

3. Select the **Print Spooler Service**.

4. Validate that the Print Spooler Service is running.

5. Select **Automatic** for Startup type.

Installing Internet Information Services (IIS) for Windows 10

1. Press the **Windows key + the R key (Win+R)** to open the Run window.

2. In the Open text field, type `appwiz.cpl` and click **OK** to open the Programs and Features window.

3. In the **Programs and Features** area, click **Turn Windows features on or off.**

   The Turn Windows Features on or off window opens.

4. Locate and select **Internet Information Services**.

   ♀ **Tip:** The remainder of this procedure includes verifying the selected various IIS features/ options or selecting the them as required.

5. For **Web Management Tools→IIS 6 Management Compatibility**, select the following as required:
   • **IIS 6 WMI Compatibility**
   • **IIS 6 Management Console**
   • **IIS 6 Scripting Tools**
   • **IIS 6 WMI Compatibility**
   • **IIS 6 Metabase and IIS 6 configuration Compatibility**
   • **IIS Management Console**
   • **IIS Management Scripts and Tools**
   • **IIS Management Service**

6. For **World Wide Web Services→Application Development Features** ensure that all features/ options are selected.

7. For **Web Server→Common HTTP Features**, select the following as required:
   • **Default Document**
   • **Directory Browsing**
   • **HTTP Errors**
   • **Static Content**

8. For **Web Server→Health and Diagnostics**, select the following as required:
   • **HTTP Logging**
   • **Request Monitor**

9. For **Web Server→Performance Features**, select **Static Content Compression** as required:

10. For **World Wide Web Services→Security**, select the following as required:
    • **Basic Authentication**
    • **Digest Authentication**
    • **Request Filtering**
    • **Windows Authentication**

11. Click **OK**to install the features you selected.

12. Click **Close** to complete the IIS installation process.

13. Close the Server Manager window.

14. Go to the section: Configuring Windows Firewall

Configuring Windows Firewall

In general for most Server OS installations, the Windows Firewall, if enabled, does not need to be configured for the software to function. If your Windows Firewall is not the default configuration, refer to the Standard Default Ports appendix to determine which ports to enable or unblock for inbound and outbound rules that are required by Mobile Printing Workflow and by Print Management Workflow.

Note: You can enable or disable individual ports. If you are using Advanced Settings in the Windows Firewall, refer to the Standard Default Ports appendix.

Disabling Windows Firewall

Note: Do not disable Windows Firewall by stopping the service.

1. Select **Control Panel→System and Security→Windows Firewall**.

   The Windows Firewall window opens.

2. On the left side of the window, click **Turn Windows Firewall on or off**.

   The Customize Settings window opens.

3. In the Home or work (private) network location settings area, select **Turn off Windows Firewall**.

4. In the Public network location settings area, select **Turn off Windows Firewall**.

5. To apply the settings, click **OK**.

6. Close any open windows.

7. If necessary, restart the server.

4

Software Installation

This chapter contains:

The installation takes place in three phases, which must be performed in the following order:

1. Copy the installation files to your server.
2. Install the Prerequisites.
3. Install the Main Server software.
4. Install Job Reporting, optional.
5. Enter the Essential Configuration settings, then add a printer.

🖉 **Note:** The installer checks if the required operating system components are enabled. If Microsoft Office is installed, the installer notifies you to remove Microsoft Office, and the installation stops.

Copying the Installation Files to Your Server

Copy all installation files to your server.

> ✎ **Note:** After the installation is complete, the installation files can be removed.

1. Navigate to the installation location, then log in to the server as Administrator.

2. Copy the installation files to your server.
   - For a Mobile Printing Workflow Premium installation, or a combined workflow installation, a software kit is provided. Install from the DVD, or copy all DVD contents onto the server.
   - For a Workplace Suite Print Management Workflow installation, download the software from support.xerox.com/support/xerox-workplace-suite, then copy and extract the contents onto the server.

Installing the Software Prerequisites

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

ⓘ   **Important:** If you access the server using Microsoft Remote Desktop Connection, disable the printer redirection.

1. To disable printer redirection, from the Remote Desktop Connection, click **Show Options→Local Resources**. Ensure that the Printers check box is clear, then click **Connect**.

2. Use an account with administrative privileges, then log on to the server where the installation is taking place.

3. Double-click the file `XeroxWorkplaceSuitePrerequisites`.

4. From the menu, select the language for installation, then click **OK**.

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

5. After the Welcome message appears, to see any additional information about the software, click **View Readme**. Click **Next**.

   The License Agreement window appears.

6. Read and accept the license terms. Select **I accept the terms in the license agreement**. Click **Next**.

   The Destination Folder window appears.

7. The default folder where the software is installed is specified.
   • To select a different folder, click **Change**, then navigate to the new folder.
   • To accept the new destination folder and return to the Destination Folder window, click **OK**.
   • To continue the installation, click **Next**.

   The Ready to Install window appears.

8. Click **Install**. A status progress bar appears. It takes several minutes for the installation to complete. If there are any errors during installation, for assistance, refer to the *Troubleshooting* section of this guide.

9. When the installation finishes successfully, the Install Completed window appears. Click **Finish**.

   The Installer window closes and a dialog appears instructing you to restart the server.

10. To restart the server, click **Yes**.

11. Log back in to the server.

12. Install the software. For installation instructions, refer to Installing the Workplace Suite Software.

Installing the Workplace Suite Software

🖉 **Note:** The following instructions are for a new Xerox Workplace Suite installation only.

1. Access the server where you want to install the Workplace Suite software. Log in to the server with administrator credentials.

    🖉 **Note:** If you are utilizing Xerox Mobile Print Workflow with your own copy of Microsoft Office 2016, install and license Microsoft Office before continuing to step 2.

2. Double-click the **Workplace Suite** file.

3. The Xerox Workplace Suite software installer detects the server operating system language automatically. If the user interface is available in your language, the Workplace Suite user interface is installed on your system.

    • Installation files are extracted and decompressed.

    • The Windows Installer window opens and checks your system for installation prerequisites. During this time, it is normal for the screen to appear inactive, and for the Windows Installer window to disappear.

    • After a few minutes, the Xerox Setup Wizard window opens, then a Welcome message appears.

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

    The License Agreement window opens.

5. Read and accept the license terms. Select **I accept the terms in the license agreement**, then click **Next**.

6. When the SQL Server Selection window appears, select one of the SQL Server options:
    • **Install Microsoft SQL Server 2014 Express Edition**
    • **Use the Existing Microsoft Database Server**

7. Click **Next**.

    🖉 **Note:** The Workplace Suite does not typically use an external database. Refer to the *Xerox® Workplace Suite Administration and Configuration Guide,Support for External SQL Database*.

8. The default installation folder for the local SQL Express database appears.
    • To accept the default destination, click **Next**.
    • To select a different folder, click **Change**, then navigate to the new folder.
    • To accept the new destination and return to the Destination Folder window, click **OK**.
    • To continue the installation, click **Next**.

9. The default installation location for the Workplace Suite software appears. Select an installation destination option.
    • To accept the default destination, click **Next**.
    • To select a different software installation folder, click **Change**, then navigate to the new folder.
    • To accept the new destination and return to the Destination Folder window, click **OK**.
    • To continue the installation, click **Next**.

10. Click **Install**.

    The installation takes several minutes to complete. An Installation Progress window and a status bar appear. After the installation finishes successfully, the Install Completed window appears.

11. Click **Finish**. The Installer window closes.

12. If needed, install the optional Job Reporting module. Refer to Installing Job Reporting.

13. To complete and configure the server, go to Completing the Installation.

Installing Job Reporting

You can install the optional Job Reporting module now or later. For details on Job Reporting, refer to *Xerox Workplace Suite Administration and Configuration Guide*.

1. Log in to the server where you want to install the Job Reporting module. Administrator credentials are required.

2. Right-click the file **XeroxWorkplaceSuiteReporting**.

3. Click **Run as Administrator**.

4. If User Access Control appears, click **Yes**.

5. From the menu, select your language for installation, then click **OK**.

   The Xerox Setup Wizard window appears. Click **Next**.

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

   The SQL Server Selection window appears.

7. To select a database from the Option to Install window, select one of the following options:
   - **Install Microsoft SQL Server 2014 Express Edition**
   - **Use the Existing Database Server**

8. Click **Next**.

   Note: Typically, the Workplace Suite uses a local database. If you require an external database, refer to the *Xerox® Workplace Suite Administration and Configuration Guide,* in the *Support for External SQL Database* topic.

   To continue installation of the local SQL Express Database, go to Step 9. The default installation folder for the local SQL Express database appears.

9. To select a different installation destination folder, click **Change**, then navigate to the new folder.

   a. To accept the new destination folder and return to the Destination Folder window, click **OK**.

   b. To continue the installation, click **Next**.

   The Ready to Install window appears.

10. Click **Install**.

    Note: The installation takes several minutes to complete. An installation progress window and status bar appears.

    After the installation finishes, the Setup Completed window appears.

11. Click **Finish**.

    The Installer window closes.

12. To complete and verify the installation, open the Xerox Workplace Suite software.

13. Select **Company→Settings→Job Reporting**.

14. To enable the job-reporting feature, click **Job Reporting**. Verify that the Database Server and Database Name are populated.

15. To verify that the installation was successful, click **Test Connection**

16. Click **Save**.

17. After completing the installation wizard, select **Company**→ **Settings** → **Job Reporting** . For information on Job Reporting, refer to the *Xerox® Workplace Suite Administration and Configuration Guide*.

Software Installation

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5

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Completing the Installation

This chapter contains:

The server is managed from a website running on your server. Depending on the software, the first time that you connect to the Workplace Suite administration website, the Getting Started wizard launches automatically. The wizard guides you through the essential software configuration settings.

To complete the installation, you need the information that you gathered in Essential Configuration Information.

1. Open a Web browser and type the following address in the browser address field: `https://localhost/login`. Press **Enter**.

    🖉 **Note:**

    - You can access the user interface at the Workplace Suite server. Select **Start→All Programs→Xerox→Xerox Workplace Suite Administrator**.

    - If prompted, enter the user name and password of any member of the Administrators group on the server.

    The Getting Started wizard appears.

    🖉 **Note:** For details on specific Getting Started Wizard settings, refer to the *Xerox® Workplace Suite Administration and Configuration Guide*.

2. Follow the step-by-step instructions, entering data in fields and making selections to configure the solution software.

    a. To confirm settings, use the **Test** button.

    b. To navigate through the following configuration steps, use the **Next/Back** buttons:

    - Profile
    - Proxy
    - License
    - Incoming Email
    - Outgoing Email, settings are required

Completing the Installation

- Setup and verify your System Administrator account

  🖉 **Note:** It is recommended that you define a backup Xerox® Workplace Suite Administrator.

- Ready to add printer

Profile

Enter your company details and administrator/contact information.

Proxy

If your network requires a proxy server to communicate to the internet, select the **Enable Proxy Server** check box and enter your proxy settings as described below, otherwise go to the next step.

🖉 **Note:** This setting is utilized by the direct licensing activation step.

Web Proxy Address

Enter the URI (Uniform Resource Identifier) for the proxy server. The URI must include the server address and port number. For example: **http://proxy.anycompany.com:8001**. The proxy address must start with **http://** or **https://**

Bypass Proxy for Local (Intranet) Addresses

When the **Enable Proxy Server** setting is active, all browser requests are forwarded to the proxy server. In some situations it is preferable to have the proxy server bypassed, such as when local resources are available through direct network access.
It is recommended that you select **Bypass proxy for (local intranet) addresses**.
To ensure that an internal IP address or URL with a fully qualified domain name bypasses the proxy server, add the address to the **Bypass proxy for local (intranet) addresses** field.

Bypass Proxy Settings for these Addresses

Enter any addresses that you specifically want to bypass the proxy server. Separate each address using a semicolon (;).

Authentication Required

If the proxy server requires authentication, select the **Authentication Required** checkbox to enable the authentication controls and complete the **Authentication Mode**, **Domain Name**, **User Name**, and **Password** fields in this area. The **Requires Authentication** checkbox is only available if **Enable Proxy Server** is selected.

Authentication Mode

If you know the authentication mode that the proxy server requires, select it from the **Authentication Mode** menu. The default setting is **Auto**.

Domain Name

Enter the domain name of the username used for authentication.

Username and Password

If **Requires Authentication** is selected for the proxy server, enter the **Username** and **Password** to gain access to the proxy server.

Test Connection

Select **Test Proxy Server** and if successful, click **Next**

License

✎ **Note:**

- When licensing, you need the activation letter, located in the activation kit.

- At any given time, you can have only one workflow enabled. If you are installing multiple Workflows, activate the Mobile Printing Workflow License first.

- If you have additional workflows, refer to Licensing Workflow Connectors, Workflows, and Conversion Servers.

There are two Activation Options when licensing the software:

- **Activate Online**: Activate the license directly from the server. The server requires access to the Internet.

- **License File**: Activate at the Xerox® Software Activation Portal, then manually install the license file.

✎ **Note:** For information on licensing additional printers, refer to Licensing Workflow Connectors, Workflows, and Conversion Servers.

Activate the License Online (Recommended Method)

⊙ **Important:** To activate the license, the Workplace Suite server requires Internet access.

1. From the Workplace Suite software webpage, select **Company** → **Licensing**.

2. Select **Actions** → **Activate License**.

3. Select the **Activate Online** option.

4. Using information provided in the Software Serial Number and License Activation Key letter, enter the following:

    - If installing multiple Workflows, activate the Mobile Printing Workflow License.

    - After installation is complete, add your additional licenses.

        – Activation Key

        – Serial Number

    ✎ **Note:** When you add a component, and you receive a new Serial Number and Activation Key, use the new numbers when generating the license file.

5. Click **Next**.

6. To verify the additional license activation, in the License Feature History, view the Licenses.

Activate the License File (Alternate Method)

Use this procedure to manually install and activate the license file.

Completing the Installation

1. Using a Web browser, navigate to https://www.xeroxlicensing.xerox.com/activation.

2. At the portal website, enter the requested information:

   • Enter your **Activation Key**, found in the activation letter, then click **Next**.

   • Enter your **Hardware Address**, found on the License screen of the Getting Started Wizard.

      🖉 **Note:** Do not enter the server Physical Address, you must use the Hardware Address from the License page.

   • Enter your **Serial Number**, found in the activation letter, then click **Next**.

   • Enter your company information and click **Next**.

3. On the Confirmation page, verify that the information is correct. If you need to make a correction, click **Back**. If the information is correct, click **Save and Download License File**.

   The File Download window opens.

4. Click **Save**.

   The Save As window opens.

      🖉 **Note:** Save the license file where you can easily locate it, such as on the server desktop. It is needed in the next step.

5. Go back to your server and select **Load License File** under **Activation Options**.

6. Click **Browse** and navigate to where the `license.dat` file is located.

7. Select the **license.dat** file.

8. Click **OK**.

9. Click **Next**.

Microsoft® Office Activation Options

This feature is available only with a Mobile Printing Premium Workflow license.

There are two Activation Options for licensing Microsoft® Office:

✎ **Note:** To activate the license, server access to the Internet is required.

- **Activate Now**:
  - In the activation kit, locate the Microsoft® Office Activation letter, then enter your Activation Key.
  - If your server does not have Internet access or failed to activate Microsoft® Office, follow the instructions onscreen to activate Microsoft® Office offline. These instructions for offline activation are covered in a later topic.
  - If the Offline activation is successful, the Conversion Server is enabled automatically.
- **Activate Later (Skip)**:
  - If you want to skip this step, and perform Microsoft® Office activation later, choose this option.
  - To activate Microsoft® Office later, when the installation wizard is complete, navigate to **Company→Settings→Conversion Servers**. Select your Conversion server, then select **Action Activate Microsoft Office**.

Using a Phone for Offline Activation of Microsoft® Office

Use this procedure to activate Microsoft® Office by phone:

1. Log in to the Workstation / Server on which the conversion server is running.
2. Open any Microsoft® Office Program. For example, Microsoft® Word.
3. Select the **File** tab and select **Account**.
4. Select **Activate Product**.
5. At the Activation Wizard, select **I want to activate the software by telephone**.
6. Select the dropdown box to **select a country/region**.

   A phone number appears. If the activation telephone numbers have changed, an activation is no longer supported appears. To locate a recent phone number, use the error message to search for a solution on the Microsoft Office support site knowledge base.

7. Follow the steps provided on the phone and, when complete, enter the Confirmation ID.
8. Select **Next**.

   ✎ **Note:** When Microsoft® Office activation completes after the wizard setup, enable the conversion server manually by clicking **Company→Settings→Conversion Servers**.

Incoming and Outgoing Mail

Incoming Mail

✎ **Note:** This feature is only available with a Mobile Printing Workflow license.

Check for blocked ports

If the email test connection is not working, validate that the incoming and outgoing mail ports are not blocked by anti-virus or anti-spam software. Refer to the Standard Default Ports .

When setting up the email server settings, refer to the information gathered in Essential Configuration Information.

Incoming Mail

This is where you set the incoming email servers along with port numbers, passwords, and whether a secure connection is needed.

The Incoming Mail Sever Settings screen displays.

✎ **Note:** For more information on the settings, refer to the Xerox® Workplace Suite Administration and Configuration Guide.

1. Select a **Server Type**:
   • Internet Message Access Protocol (IMAP)
   • Microsoft Exchange Web Services - see special section for details
   • Post Office Protocol 3 (POP3)
   • Notes Remote Procedure Call (Lotus Notes) - see special section for details

2. Enter the **Server Information** (list varies based on server type):
   • Server Address
   • Port
   • Receiving Email Address
   • Watch Folder (IMAP option only)
   • Use Secure Connection
   • Authentication Mode
   • Domain Name (Microsoft Exchange Web Services option only)
   • Polling Rate

3. Enter the **Login Information** (used by the server to retrieve incoming jobs):
   • User Name
   • Password

4. Click **Test Connection**.

   Verify that the test connection is successful. If the connection fails, select **Details** for more information.

5. Click **Next**.

Outgoing Mail

Outgoing Mail is where you set the outgoing email server along with port numbers, passwords, and whether a secure connection is needed.

When setting up the email server settings, refer to the information gathered in Essential Configuration Information.

> 🖉 **Note:** For more information on the settings, refer to the Xerox Workplace Suite Administration and Configuration Guide.

The **Send From Display Name** and **From Email** addresses are required for the solution software to operate. They must be set up in ample time prior to the solution software installation so that the email addresses are operational.

1. Select a **Server Type**:
   • Simple Mail Transfer Protocol (SMTP)
   • Microsoft Exchange Web Services - see special section for details
   • Notes Remote Procedure Call (Lotus Notes) - see special section for details

2. Enter the **Server Information**:
   • Server Address
   • Port (SMTP only)
   • Use Secure Connection (SMTP only)
   • Authentication Mode (SMTP only)
   • From Email Address
   • Send From Display Name
   • Domain Name (Microsoft Exchange Web Services option only)

3. Enter the **Login Information**:
   • User Name
   • Password

4. Enter a **Test Email Address** and click **Send Test Email**.

   Verify that the test email was received in the associated mailbox. If the Send Text email send fails, select **Details** for more information.

5. Click **Next**.

Details When Using Microsoft Exchange Web Services

The software can connect to a Microsoft Exchange Server 2007 or later using Exchange Web Services (EWS). This connection is made over the HTTPS protocol. The software can authenticate using either Basic Authentication or Impersonation. With Basic Authentication, the username and password are sent securely to the Exchange Web Services server for authentication. When Impersonation is used, the software logs in as the impersonated user for the duration of the EWS connection. Login credentials for the software system are required for the impersonated user.

Incoming Tab

• **Server Address**: Use this area to manually override and specify a URL for the EWS server. This value will be given to you by the company IT department. It is recommended that you use the Auto-Discover option.

   > 🖉 **Note:** If you specify a manual URL and it later changes, all email capabilities stop functioning.

• **Receiving Email Address**: The email address to be used by Mobile Printing.

- **Polling Rate**: The rate at which to poll for emails.
- **Domain Name**: The domain that will be used by the software.
- **User Name**: The user name that will be used to connect to Exchange Web Services.
- **Password**: The password that will be used to connect to Exchange Web Services.

Outgoing Tab

- **Server Address**: The domino server to connect to
- **From Email Address**: The email address the users will see as the originator of their confirmation email.
- **Reply-to Email Address**: The email address the users will reply to when responding back.
- **Domain Name**: The domain that will be used by the software.
- **User Name**: The user name that will be used to connect to Exchange Web Services.
- **Password**: The password that will be used to connect to Exchange Web Services.

Details When Using Notes Remote Procedure Call (Lotus Notes)

Lotus Domino Email Connection Support

To connect the software to a Lotus Domino server, the Lotus client libraries must be installed on the server. These libraries should be installed on the host server by the company's IT department. Assist the IT department in getting the correct libraries to connect to their Lotus Domino mail server. Configure and run the Lotus client library using the receiving email address in order to create the adaptor file (mail file) that is pointed to during setup.

Lotus Notes Client 8.5.1 and 9.0.1 are supported.

Incoming Tab

- **Server Address**: The domino server to connect to
- **Receiving Email Address**: The email address to be used by Mobile Printing Workflow.
- **Watch Folder**: The folder to watch in the email account (i.e. $Inbox)
- **Polling Rate**: The rate at which to poll for emails.
- **MailFile**: The domino mail file (i.e. mail\User)
- **Password**: The password to use to make the connection

Outgoing Tab

- **Server Address**: The domino server to connect to
- **From Email Address**: The email address the users will see as the originator of their confirmation email.

- **Display Name**: The Name the users will see as the originator of their confirmation email.
- **MailFile**: The domino mail file (i.e. mail\User)
- **Password**: The password to use to make the connection

Setting Up and Verifying Your System Administrator Account

1. To set up your System Administrator account, enter the name and Email address for the System Administrator.

2. To verify your System Administrator account, enter the Confirmation Number received in your email.

   To indicate that you have completed the Getting Started wizard, the Ready icon changes to green.

3. To complete the installation, click **Next**, then **Finish**.

   📝 **Note:** It is recommended that you define a backup System Administrator.

Troubleshooting the Installation

Problems:

✎ **Note:** For more troubleshooting information, refer to the *Xerox® Workplace Suite Administration and Configuration Guide* and the *Xerox® Workplace Suite Troubleshooting Guide.*

- When you add a licensing option, the Reset Server Hardware Address option appears on the licensing screen.
  - The Reset Server Hardware Address message can appear when your Hardware Address is the short version, with a length of 12 digits.
  - You cannot license any new options until the Hardware address is the correct format with a length of 25 digits.
  - Do not reset the Hardware Address until you contact an authorized Xerox Support representative.
  - An Authorized Xerox Support representative assists you in transferring your license to the new Hardware address.

- `The Print Management Workflow features are not available.` Add the Print Management Workflow license. Refer to Licensing Workflow Connectors, Workflows, and Conversion Servers.

- `The Mobile Printing Workflow features are not available.` Add the Mobile Printing Workflow license. Refer to Licensing Workflow Connectors, Workflows, and Conversion Servers.

- `Warning: There is no conversion server available to process print jobs.` For detailed information on this message, click **Company→Settings→Conversion Servers**. This issue occurred because Microsoft®Office did not install during installation.

To add Microsoft® Office for document conversion:

1. If you are not installing Microsoft Office from the DVD, ensure that the DVD resource folder is at the same level as the Xerox Workplace Suite installer.

2. Ensure that the Office ZIP files are in the resource folder.

3. Rerun the Workplace Suite installation software. This process installs Microsoft® Office automatically.

4. To activate Microsoft® Office:

   a. Go to Microsoft® Office Activation Options.

   b. In the *Xerox® Workplace Suite Installation Guide*, follow the instructions for *Microsoft Office Activation Options.*

Adding A Printer

✎ **Note:** One printer connection is included with the server software. To configure a single printer, follow the directions in this procedure. To add more printers, and for more information on the workflow and settings, refer to the *Xerox® Workplace Suite Administration and Configuration Guide.*

1. Select the Printers tab.

   The Printers list appears.

2. Click **Actions→New**.

   The Create New Printer window appears.

3. On the Details tab, enter the IP address of a Xerox Extensible Interface Platform® (EIP)-enabled device, non-EIP device, or non-Xerox device that resides within your firewall.

   ✎ **Note:** The IP address you add can be an IPv4 or host name.

4. For Display Name, enter the name that you want to appear in Workplace Suite for the printer.

5. For Printer Language, select the language that you want to use for the printer:
   • **PCL 6**
   • **PostScript**

6. Select the printer protocol:
   • **Raw or LPR**
   • **IPP over SSL**

7. On the Features tab, select the appropriate workflows:
   • For Mobile Printing, select **Mobile Print**.
   • For Print Management, select a workflow:

     • **Authentication** and **Xerox Secure Access Reader Support**

     • **Desktop Print**

   • To process and track jobs for security content, select **Content Security**.
   • For Printer Client or Usage Tracking, select an option:

     • Install Printer Client

       – Enable Copy

       – Enable Scan

     • Usage Tracking (Network Accounting)

8. For Accounting Credentials, select the appropriate settings:
   • **No Accounting**
   • **Network Accounting**
   • **Standard Accounting**

9. If required, for Secure Printing, select **Secure Print Required**.

10. For Auto Release All Jobs, select the appropriate option:
    - **Never**
    - **Using Access Card or Alternate Login**
    - **Using Network Appliance**

    📝 **Note:** If you select Never and disable the printer client application, you cannot release held print jobs on the Xerox printer.

11. For Site, click **Change**.

12. Select the appropriate site, then click **OK**.

13. The Pull Groups option is available with a Print Management Workflow license. On the Pull Groups tab, ensure that the printer groups are in the appropriate boxes. Use the arrow buttons to select **Unassociated Groups** or **Associated Groups**.

14. On the Administration tab:
    - To change the default administration settings, enter the required information.
        - **User name**
        - **Password**
    - To change the printer configuration, for Server Information, select an SNMP version:
        - **SNMP v1/v2**. To change the default settings, enter values as needed.
            – **Set Community Name**
            – **Get Community Name**
        - **SNMPv3**

        📝 **Note:** Mobile Printing Workflow supports manual printer addition and discovery using SNMPv3. You cannot enable SNMPv3 using the CSV import method for adding printers. If you select SNMP v1/v2, use the Set Community Name and Get Community Name as defined for the printer.

    - To enable all communication between the printer client and the server, to use HTTP, for Security, select **Allow HTTP Connections**.

15. To enable the printer, select the check box for **Enable Printer**.

16. Click **Save**.

    The Create New Printer window closes and the printer list appears with the printer status of pending discovery. When the device discovery completes successfully, the status appears as enabled with a green icon and check mark. To see printer status changes automatically as they occur, on the printer list, enable **Automatic Refresh**.

    If the device status appears as a red X, to observe the error message, select the printer, then hover over the icon. To correct the device registration settings, select the printer. Retype the IP address, user name, and password, then ensure that the device that you want to add is within your firewall.

Adding a Pull Print Network Print Queue for Print Management Workflow

This feature is only available with a Print Management Workflow license.

The following instructions are for common setup. Based on your organizational needs, refer to the Xerox® Workplace Suite Administration and Configuration Guide for more detailed setup procedures.

There are two types of print queues:

- **Pull Print Network Queue** – The traditional network printing queue where jobs are sent to a remote server which can be the Workplace Suite server (local) or an external print server. When using network queues, always configure Jobs for server-side rendering.

- **Pull Print Client Queue** – Print queues that are to be installed on a user workstation. Jobs are held on that user workstation until released to a printer.

    > **Note:** For detailed instructions on adding the Print Management Client, refer to the Xerox® Workplace Suite Administration and Configuration Guide and the Print Management Workflow User Guide.

> **Note:** The Xerox® Print Management Workflow supports a print server running on the same box as Workplace Suite. If necessary, the system administrator can configure 0 to N external print servers. For more information, refer to the Xerox® Workplace Suite Administration and Configuration Guide.

Pull Print Network Queue Detailed Instructions - Server Setup

Adding a Network Printer (Server Installation)

You can use the following method to add multiple printers. In this example, a single printer is added.

1. Go to the Control Panel and choose **Devices** and **Printers**. Click **Add Printer**.

    The Add Printer dialog displays.

2. Choose **The Printer that I want isn't listed** option.

3. In the Find a printer by other options screen, choose **Add a printer using a TCP/IP address or hostname**, and then click **Next**.

4. In the Type a printer hostname or IP address screen, enter the multifunction printer IP address or hostname, and then click **Next**.

5. In the Type a printer name screen, enter an easy-to-remember printer name, and then click **Next**.

6. In the Printer Sharing screen, choose **Share this printer so that others on your network can find and use it** option.

7. Enter an easy-to-remember Share name and location (Comment is optional), and then click **Next**

8. Click **Finish** to complete the installation.

Configuring a Network Printer (Server Installation)

1. Go to the Control Panel and choose **Devices** and **Printers**.

2. Right-click the printer listed in the Printers list.

3. Choose **Printer Properties** from the selection menu.

4. On the Printer Properties window, go to the **Ports** tab. Select the server using the **Xerox XMP v3 Port Monitor**.

5. Select an appropriate driver based on printer models, capabilities, manufacturers, and so on.

6. Configure the printer, e.g., Model, Finisher, and so on.

7. Configure the printer for client-side rendering.

8. Install both 32-bit and 64-bit drivers.

    a. On the Printer Properties window, go to the Sharing tab and click **Additional Drivers**.

    b. Make sure both Processor boxes, x64 and x86, are checked and click **OK**.

    c. Click **Browse** and locate the directory where **ntprint_inf.inf** file is located.
    The default Xerox Print Prerequisites location is `C:\Program Files (x86 for 32-bit) \Xerox\Xerox Print Prerequisites\InstallerSupport\X-GPD\Windows <Printer Language>\<32-bit or 64-bit>`.

    d. Click **OK** to return to the Printer Properties dialog window.

9. Pick a Share name that makes sense and is understandable by the users, and then click **OK** to share the printer.

10. Enable the queue on the **Workplace Suite Admin Tool** and ensure that the Queue Type is set to **Pull Print Network Queue**.

11. Select the Conversion Mode for the queue: **None** or **Simple**.
    - **None** – Print jobs will not be parsed and cannot be modified. This mode gives the best printing performance, but does not support other features that require the job to be parsed and modified. For example, a job will not be processed for Content Security keyword search. Print rules will not modify print attributes such as Color and Sides. User Print Quotas will use the Pages per Job Estimation value.
    - **Simple** – The user can modify quantity, color, and simplex/duplex. This selection is only supported by Xerox printers.

12. Add the Incoming Queue to a Pull Group.

Adding a Pull Print Client Queue for Print Management Workflow

For information on adding a Client Print Queue, refer to Xerox® Workplace Suite Administration and Configuration Guide: Print Management Client Queue - Server Setup or Print Management Client - User Setup

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Post-installation Tasks

This chapter contains:

Review the following section after completing the software installation.

For more information on features, refer to Xerox® Workplace Suite Administration and Configuration Guide.

If you are having a problem, go to the searchable support website for more information: www. support.xerox.com/support

Checking for Updates

It is recommended to always install the latest updates of the Software and Printer Model Updates files.

The most up-to-date software and patches are located at: http://www.support.xerox.com/support/

Checking for Port Blocking

Ensure that the outgoing mail server is not blocked by anti-virus or anti-span software. Check with your IT Administrator for details. For more information, refer to the Standard Default Ports appendix.

Microsoft® Office Updates (for Mobile Printing only)

Microsoft® Office updates are supported. Automatic updates for Microsoft® Office are turned off by default. Follow your corporate policy regarding automatic updates.

Apache OpenOffice Document Support (for Mobile Printing only)

To support OpenOffice document printing, go to the Apache site and install Apache OpenOffice 4.1. If an earlier version of OpenOffice was previously installed, upgrade to OpenOffice 4.1.

> **Note:** This requires a restart of the Xerox® Mobile Printing DCE Service (or a reboot of the system) before this will work.

Post-installation Tasks

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Support

This chapter contains:

Customer Support

Customer support varies by geography. Check with your local Authorized Xerox sales representative for details specific to your country. Xerox® Customer Support Organizations will provide support in enabling printers for the software to customers with support contracts.

Calls to Xerox for support should only be made by the customer's IT department or System Administrator. If an end user (mobile user) has an issue, they should call their internal support (IT or System Administrator) first. Only when a System Administrator cannot resolve the issue should a call be made to Xerox for support.

For the fastest issue resolution, you are encouraged to seek a solution via the web, at: http://www.support.xerox.com/support/

The support documentation, troubleshooting steps, and hints and tips are available online.

Maintenance Support

Support for PC platforms and operating systems are not covered under the Software Maintenance Agreement.

Support

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Standard Default Ports

The following table lists the standard default ports used for many of the protocols with Workplace Suite. Some port numbers are configurable in Workplace Suite such as the POP and IMAP ports. Other port numbers are non-configurable and cannot be changed. You may need to change some port numbers depending on the server you are communicating with or use the default ports if they cannot be changed. All ports used must be unblocked in the firewall that is being used on the solution server.

Protocol	Transport and Port Value	Use	Option	Direction
Xerox Workplace Mobile App Ports:				
HTTPS using TLS	TCP 443	Authentication, Job / Printer Listing, Initiate Print Conversion	Non-configurable	App to XWS Service
Xerox Workplace Suite:				
DCE	TCP 8801, 8802	XWS and DCE Communication	Configurable	XWS to DCE
HTTPS	TCP 443	XWS uses this port to communicate with other XWS servers. XJAS and XJAC also request info using this port.	Configurable	XWS / XJAS / XJAC to XWS
HTTP	TCP 80	XWS uses this port to notify XJAC that a job is ready to be released.	Non-configurable	XWS to XJAC
SQL	TCP 1433	Microsoft SQL Client to Server Communication for database queries and storing.	Non-configurable	XWS to SQL Server
LDAP	TCP 389	Authentication, User Look-up	Non-configurable	XWS to ADS Server
LDAPS	TCP 636	Authentication, User Look-up.	Configurable	XWS to LDAP Server
HTTPS using TLS	TCP 443	Convenience Authentication, EIP Registration, Configuration, Accounting, Scan Job Retrieval. Note: HTTPS preferred.	Non-configurable	XWS to Printer
HTTP	TCP 80	EIP Registration, Configuration, Accounting, Scan Job Retrieval. Note: HTTPS is used if enabled on the printer.	Non-configurable	XWS to Printer

Standard Default Ports

Protocol	Trans-port and Port Value	Use	Option	Direc-tion
SNMP	UDP 161	Printer Discovery, Configuration	Non-configurable	XWS to Printer
HTTPS using TLS	TCP 443	Send Print History and Retrieve Printer List to or from XMS.	Non-configurable	XWS to XSM
HTTPS using TLS	TCP 443	Send system utilization information to the Workplace Suite Reporting Service (MSRP)	Non-configurable	XWS to MSRS
SMTP	TCP 25	Sending email responses	Non-configurable	XWS to SMTP Server
SMTP/TLS (Secure SMTP)	TCP 465	SMTP over TLS. TCP port 465 is reserved by common industry practice for secure SMTP communication using the SSL protocol.	Configura-ble	XWS to SMTP Server
POP3	TCP 110	Post Office Protocol version 3, enables "standards- based" clients such as Outlook to access the email server.	Configura-ble	XWS to POP3 Server
POP3/TLS	TCP 995	POP3 over TLS uses TCP port 995 to receive encrypted email messages.	Configura-ble	XWS to POP3 Server
Exchange Web Services	TCP 443	Exchange Web Services used for receiving Email	Configura-ble	XWS to Exchange
IMAP	TCP 143	Internet Message Access Protocol version 4, may be used by"standards-based"clients such as Microsoft Outlook Express or Netscape Communicator to access the email server.	Configura-ble	XWS to IMAP Server
IMAP/TLS	TCP 993	IMAP4 over TLS for securely receiving encrypted email messages.	Configura-ble	XWS to IMAP Server
NRPC	TCP 1352	Lotus Notes RPC. This is the API used between Lotus Notes and the Lotus Domino server. Communication between XMPC and Lotus Notes is via a local API on the same PC.	Non-configurable	XWS (running Lotus Notes) to Domino Server
HTTP / HTTPS	TCP 80 / TCP 443	Administration using Web Admin Tool. If a certificate is already configured on the IIS default website, it will be used by Xerox® Workplace Suite. If no certificate is configured, Xerox®Workplace Suite will create a self-signed cert. The administrator has the option to load a certificate from a trusted authority later if desired.	Non-configurable	Browser to Work-place Suite Service

Protocol	Transport and Port Value	Use	Option	Direction
HTTPS	TCP 8443	HTTP over TLS. Used to activate or validate a license. If the customer is using off-line activation, then this port is not needed.	Non-configurable	Workplace Suite Service to Xerox Licensing Server
IPP	TCP 631	Receipt of Mobile Jobs on phones using the iOS Native Print feature. Always uses SSL.	Non-configurable	Mobile Phone to XWS
HTTPS	TCP 443	HTTP over TLS. Used to validate a Chrome browser or Chromebook single sign-on user with Google.	Non-configurable	XWS to Google
AppSocketRAW or Windows TCP-Mon	TCP 9100	Print Submission of Copy Jobs	Non-configurable	XWS to Printer
LPR	TCP 515	Print Submission of Copy Jobs	Non-configurable	XWS to Printer
IPP over TLS	TCP 443	Print Submission of Copy Jobs. Encrypted print transfer.	Non-configurable	XWS to Printer
Document Conversion Engine Server Ports:				
AppSocketRAW or Windows TCP-Mon	TCP 9100	Print Submission	Non-configurable	DCE to Printer
LPR	TCP 515	Print Submission	Non-configurable	DCE to Printer
IPP over TLS	TCP 443	Print Submission. Encrypted print transfer.	Non-configurable	DCE to Printer
DCE	TCP 8801, 8802	XWS and DCE Communication	Configurable	XWS to DCE
Print Server Ports:				
SMB Print	TCP 445	Print submission to a network queue. Client Workstation to print server.	Non-configurable	Workstation to Print Server
DCE/RPC	TCP 1058	Network Print Queue Access and Driver Download. From Workstation Print Queue to Print Server or from Workplace Suite Client to Print Server.	Non-configurable	Workstation to Print Server
Printer and Printer Client (EIP App) Ports:				

Protocol	Transport and Port Value	Use	Option	Direction
HTTP / HTTPS	TCP 80 / 443	Retrieval of EIP Browser pages for display on the UI. Uses HTTPS by default. Authentication, Job Listing, Initiate Print Conversion.	Non-configurable	Printer EIP App to XWS Service
HTTPS	TCP 443	Printer Authentication	Non-configurable	Printer to XWS
Xerox Job Agent Service Ports:				
Raw IP	TCP 9100	Print Submission	Configurable	XJAS to Printer
LPR	TCP 515	Print Submission	Configurable	XJAS to Printer
IPP over TLS	TCP 443	Printer Submission	Non-configurable	XJAC to Printer
HTTPS	TCP 443	Configuration, Job Information, Print Release	Configurable	XWS to XJAS
Xerox Job Agent Client Ports:				
Raw IP	TCP 9100	Print Submission	Configurable	XJAC to Printer
LPR	TCP 515	Print Submission	Configurable	XJAC to Printer
IPP over TLS	TCP 443	Print Submission	Non-configurable	XJAC to Printer
DCE/RPC	TCP 1058	Network Print Queue Access and Driver Download. From Workplace Suite Client to Print Server.	Non-configurable	Workplace Client to Print Server
HTTPS	TCP 443	Configuration, Job Information, Print Release	Configurable	XJAC to XWS
Raw	UDP 9807	Notification of Print Job Release	Configurable	XWS to XJAS
Network Appliance Ports:				
RAW	TCP 7778	Receive Card Swipe Data from Elatec TCPConv	Configurable	Network Appliance to XWS
RAW	TCP 7777	Receive Card Swipe Data from Elatec TCPConv2	Configurable	Network Appliance to XWS

Protocol	Transport and Port Value	Use	Option	Direction
RAW	TCP 2001	Receive Card Swipe Data from RFIdeas Ethernet 241	Configurable	Network Appliance to XWS
iOS Native Printing Ports:				
DNS-SD	UDP 53	Mobile Phone printer discovery using DNS	Non-configurable	Phone to DNS Server
mDNS	UDP 5353	Mobile Phone printer discovery on the local subnet using mDNS	Non-configurable	Phone Broadcast on Local Subnet
IPP	TCP 631	IPP Print submission to Xerox® Workplace Suite. Always uses TLS.	Non-configurable	Phone to XWS

A

Support for External SQL Database

This appendix contains:

External SQL database servers are supported by the following Microsoft SQL Servers:

- * Microsoft SQL Server 2016
- * Microsoft SQL Server 2014
- * Microsoft SQL Server 2012
- Microsoft SQL Server 2008

* Recommended for Failover Server configuration.

Using an External Microsoft SQL Database

To connect your Microsoft SQL Database server, perform the following tasks.

When using an external Microsoft SQL database, ensure that:

- Windows Authentication is enabled
- The user who installs the software can list and create databases in the desired instance
- If the database server is external, ensure that remote connections and the TCP/IP protocol are enabled

Prompting for an SQL Server Selection

When you are prompted for SQL server selection:

1. Select **Use existing MS SQL database server**.

2. Enter your database server address, including the database instance name and port.

   Example: `<servername>\<instancename>,<port>` or `<IPAddress>`
   `\<instancename>,<port>`

3. Select **Test**.
   - If the test is successful, click **Next**.
   - If the test is not successful, fix the setting according to the error message.

4. Select **Create new database**. Use the default name.

5. Select **Test**.
   - If the test is successful, click **Next**.
   - If the test is not successful, fix the setting according to the error message.

6. Return to the installation procedure.

B

Licensing Workflow Connectors, Workflows, and Conversion Servers

This appendix contains:

This chapter instructs how to license additional Workflow Connectors, Workflows, and Conversion Servers. An activation letter is required.

There are two Activation Options when licensing additional printers on the software:

- **Activate Online**: Activate the license directly from the Workplace Suite Server. The server requires access to the Internet.

- **License File**: Activate at Xerox® Software Activation Portal, then manually install the license file.

Alternate Method to Activate Additional License Files

Use this procedure to manually install and activate additional license files.

The following information is required to activate additional license files:

- License Activation Key for the following items:
  - Workflow device connectors
  - Workflows
  - Microsoft® Office 2013 Conversion Server
- Hardware address from the Server Licensing page
- Serial number
- Company information

🖉 **Note:** If you already have the License File (license.dat), click **Next** and browse to your file and load it.

🖉 **Note:** A license file is generated using the Software Activation Portal (SWAP).

1. Open a web browser and navigate to https://www.xeroxlicensing.xerox.com/activation.

2. At the portal website, enter the required information:

   - For Activation Key, enter the activation key that is in your activation letter email. Click **Next**.
   - For Hardware Address, enter the hardware address that is on the License screen of the Getting Started Wizard, or select **Company→Licensing**.

     🖉 **Note:** Do not enter the server Physical Address. You must use the Hardware Address from the License page.

   - For Serial Number, enter the serial number that is in your activation letter email. Click **Next**.
   - Enter your company information , then click **Next**.

3. On the Confirmation page, verify that the information is correct.
   - To make a correction, click **Back**.
   - If the information is correct, click **Save and Download License File**.

   The File Download window appears.

4. Click **Save**.

   The Save As window appears.

   🖉 **Note:** Save the license file where you can easily locate it, such as on the server desktop. It is needed in the next step.

5. Return to the server, then select **Company→Licensing**.

6. Select **Actions→License File**.

7. Click **Browse**, then navigate to your `license.dat` file.

8. Select the `license.dat` file.

9. Click **OK**.

10. Click **Next**.

11. Access **License Feature History**. Verify that the additional licenses are activated.

Activate the License Online (Recommended Method)

ⓘ   **Important:** To activate the license, the Workplace Suite server requires Internet access.

1. From the Workplace Suite software webpage, select **Company** → **Licensing**.

2. Select **Actions** → **Activate License**.

3. Select the **Activate Online** option.

4. Using information provided in the Software Serial Number and License Activation Key letter, enter the following:

   - If installing multiple Workflows, activate the Mobile Printing Workflow License.

   - After installation is complete, add your additional licenses.

     – Activation Key

     – Serial Number

   ✎   **Note:** When you add a component, and you receive a new Serial Number and Activation Key, use the new numbers when generating the license file.

5. Click **Next**.

6. To verify the additional license activation, in the License Feature History, view the Licenses.