



## Xpress Send Hosted – Client and Web Interface Configuration

**Note: Before you begin using this document make sure you have done all back end configuration steps!**

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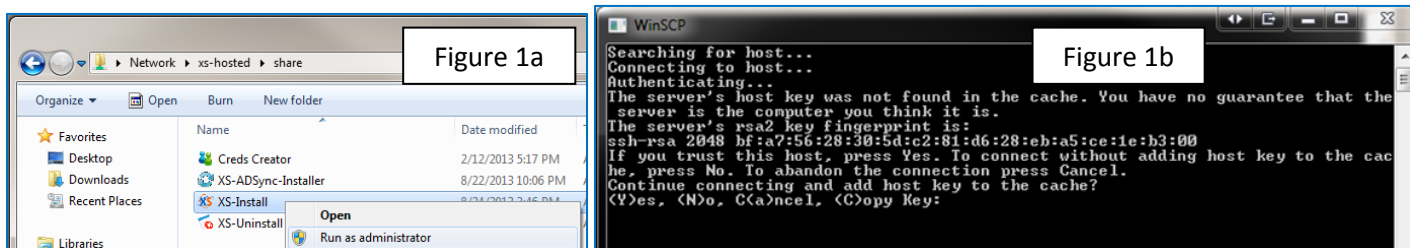
## 1. Installing the Xpress Send Client

The Xpress Send client must first be manually installed on a workstation so that it can be configured. Once it is configured it can be automatically pushed to workstations through the web interface.

### 1a. Installing the non-configured client

Perform the following steps on any workstation:

- Open **My Computer**
- In the address bar type: `\\<XS IP Address>\share`
- Run **XS-Install.exe** as an Administrator (Figure 1a)
- A WinSCP window will open. Type "Y" to save the SSH key (Figure 1b)



### 1b. Configuring the Xpress Send server name

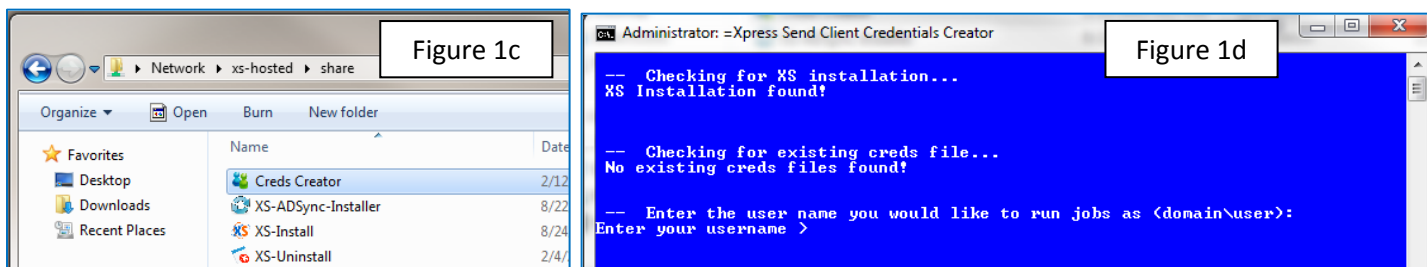
If you have changed your Xpress Send server name you may not see (Figure 1b) because the installation will not be able to contact the correct server. If you have changed the name follow these steps:

- Open `C:\XS\Settings.ini`
- Change the `XSServer=xs-hosted` line to read `XSServer=<XS IP Address or Server Name>`
- Run `C:\XS\JobPull.exe`. You will now see the WinSCP prompt in (Figure 1b)

### 1c. Configuring a service account

You should configure a service account to run your jobs. This account should have administrator access over your workstations and network access to any shared folders you will be using. All jobs processed by XS will run under this account. If you do not configure a service account jobs will run under the local "XSUser" account.

- Open **My Computer**
- In the address bar type: `\\<XS IP Address>\share`
- Run "**Creds Creator.exe**" as an Administrator (Figure 1c)
- Follow the prompts to enter your username and password information for the service account. If you are using a domain account make sure you use the `domain\user` format. (Figure 1d)



## 2. Web interface configuration

Through the web interface you will upload your Xpress Send licenses and XS client customizations.

### 2a. Installing your Xpress Send license

Open the Xpress Send interface by opening your web browser to **http://<XS Server IP>**

- Go to File Management -> **System Files** (Figure 2a)
- Choose A File Type: **Upload License (userlicense.lic)** (Figure 2b)
- Upload your **userlicense.lic** file that was emailed to you by the Xpress Send sales team

### 2b. Uploading your WinSCP.ini file

Your WinSCP.ini file holds the SSH key data. This will allow the XS client to connect without prompting for approval.

- Go to File Management -> **System Files** (Figure 2a)
- Choose A File Type: **Upload WinSCP.ini (WinSCP.ini)** (Figure 2b)
- Upload **C:\XS\bin\WinSCP.ini**

### 2c. Uploading your credentials file

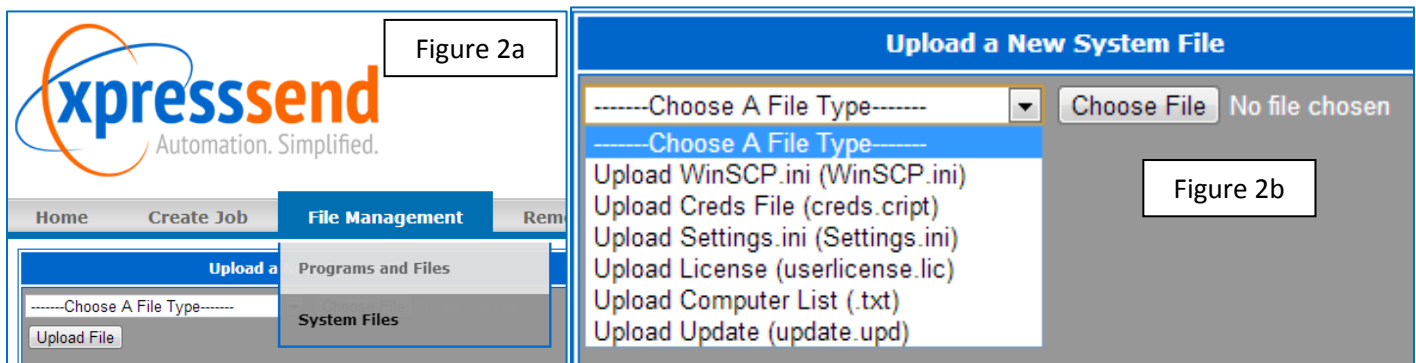
The credentials file is created when you run the “Creds Creator.exe” program. If you aren’t running a service account you can skip uploading this file.

- Go to File Management -> **System Files** (Figure 2a)
- Choose A File Type: **Upload Creds File (creds.cript)** (Figure 2b)
- Upload **C:\XS\bin\creds.cript**

### 2d. Uploading your Settings.ini file

The Settings.ini file holds the XS server name. If you haven’t changed the server name you can skip uploading this file.

- Go to File Management -> **System Files** (Figure 2a)
- Choose A File Type: **Upload Settings.ini (Settings.ini)** (Figure 2b)
- Upload **C:\XS\Settings.ini**



### 3. Testing your configured client

It is recommended that you uninstall and reinstall the XS client on your test machine. This will allow you to test your client configuration settings.

#### 3a. Add your test computer to the XS system

- Open the Xpress Send web interface
- Go to Status -> **License Status** (Figure 3a)
- Under “**Add a Single Computer**” add the computer name of your test computer (Figure 3a)

Used	Available	Total	Expires
0	15	15	20990101

**Add a Single Computer**  
Enter a computer name a click **ADD** to add it to the system:

To upload a list of computer names upload a "Computer List" from the [System File Management](#) screen.

Figure 3a

#### 3b. Reinstall the XS Client on your test computer

Uninstall the non-configured client and reinstall your newly configured client.

- Run: `\\<XS Server IP\share\XS-Uninstall.exe`
- Confirm that `\\<XS Server IP\share\XS-Install.exe` now has a current date and time. This file will get updated when you upload a WinSCP.ini, creds.cript, or Settings.ini file.
- Run: `\\<XS Server IP\share\XS-Install.exe`

#### 3c. Checking for a successful installation

Follow the steps below the check that all customization settings have been applied.

- Open `C:\Settings.ini` with a text editor. Confirm that your XS server address is correct.
- Run: `C:\XS\JobPull.exe`. Confirm that the program opens and closes without prompting you to confirm the SSH key. If it does prompt for an SSH key you will have to upload a valid WinSCP.ini file. (Step 2b)
- Open “**Task Scheduler**” in Windows
- Confirm that the **XSCheck task** shows that it is running as your service account

#### 3d. Testing XS Client installation from the web interface

The XS Client can be automatically installed from the web interface. Do the following on your test computer:

- Uninstall the XS Client if it is installed. Run: `\\<XS Server IP\share\XS-Uninstall.exe`
- On the XS web interface go to **Remote Install -> Install**
- Highlight your test computer. Input a username and password with admin rights over your computer.
- Within a minute or two the XS Client should be installed on your test workstation. You can review the “Remote Install logs by going to **About -> Remote Install Logs** on the XS web interface.

#### 4. Adding computers to the Xpress Send system

Any computer that will communicate with the Xpress Send system needs to be added in. You can add computers three different ways based on your organization's needs.

##### 4a. Adding a single computer through the web interface

The fastest and easiest way to add a single computer is through the web interface.

- Open the XS web interface
- Go to **Status -> License Status**
- Under **"Add a Single Computer"** you can add a computer to the system (Figure 3a – Above)

##### 4b. Adding multiple computers through a text file

You can add a list of computers by compiling them into a text file. The text file needs to have one computer name per line. It needs to be in .txt format. Once you have the list compiled you can upload it to the system.

- Go to File Management -> **System Files** (Figure 2a - Above)
- Choose A File Type: **Upload Computer List (.txt)** (Figure 2b - Above)
- Upload your list of computers into the system

##### 4c. Using Active Directory Sync to add computers

You can use the AD Sync tool to add computers out of an OU in your Active Directory environment. AD Sync is a one-way synchronization. It will add computers to the system, but it cannot remove them. AD Sync can be installed on any server or workstation that is joined to your AD domain.

- Open **My Computer**
- In the address bar type: `\\<XS IP Address>\share`
- Run **"XS-ADSync-Installer.exe"**
- Open `C:\XS-ADSync\Settings.ini` with a text editor and confirm that your XS server name is correct.
- Open `C:\XS-ADSync\Dist-List.ini` with a text editor
- On each line type in the distinguished name of each OU that you want to sync with Xpress Send
- Run **"C:\XS-ADSync\ADSync.exe"** to sync AD with Xpress Send

If you want the synchronization to run on a regular basis create a scheduled task to run `C:\XS-ADSync\ADSync.exe`.

##### 4d. Deleting computers from the Xpress Send system

Deleting computers from Xpress Send must be done through the web interface. Once a computer is deleted from the system all job entries, logs, and data about that computer will be completely removed.

- Open the XS web interface
- Go to **Status -> License Status**
- Highlight one or more computers from the **"Delete Computers"** section and click **Delete** (Figure 4a)

