

# **XMedius Cloud Services – Configuration Guide**

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# XMedius Cloud Platform and Services

The XMedius Cloud platform includes:

- An **Account Administration** functionality, that allows the management of your Enterprise Account and all related User Accounts.
  - 👉 **Note:** This functionality is always provided when you subscribe to at least one service, and is common to all subscribed services – which means, among others, that a user will be able to benefit from all services using the same User Account.
- The following services (available according to your Enterprise Account subscription):
  - **XMediusSENDSECURE** (SendSecure Service):

This service allows users to easily and securely exchange large and/or sensitive files via virtual SafeBoxes.
  - **XMediusFAX** (Fax Service):

This service allows users to send and receive faxes in multiple ways (many integrations with your business environment can be configured).

## Purpose of this document

---

This document provides the main help topics to administer your XMedius Cloud Enterprise account and use/configure your Services. It regroups several KB articles that can be found in the XMedius Cloud Help Center (<https://support.xmedius.com/hc/sections/200642586-Knowledge-Base>).

Note that some topics are intended for end users of the services, while the others are intended for Enterprise Account administrators.

### Additional documentation

Further topics (not found here) about the Fax Service and its web interfaces are available from the Web Portal's menu:

- Fax user interface: **Help ► Faxing Help.**
- Fax settings for administrators: **Help ► Fax Administration Help.**



# Chapter 1 Account Administration Management (Enterprise Administrators)

## Managing Users

*A description of users and how to manage them.*

### Users

Users are people who have an account to benefit from the XMedius Cloud Services. They are able to manage most of their account information and settings, and use the services to which they are registered:

- Fax Service: send and receive faxes, and monitor their faxes.
- SendSecure Service: create SafeBoxes and manage/monitor all SafeBoxes they own.

### Administrators

An administrator is a user that has the additional rights to manage the Enterprise Account and Service settings. These rights are provided with the "Administrator" Role in the user profile settings. Administrators are especially responsible of creating and managing all user accounts within the Enterprise Account.

### Creating User Accounts

An administrator can add users in three different ways:

- By invitation – see [Adding Users by Invitation](#) on page 2.
- By direct creation – see [Adding Users by Direct Creation](#) on page 2.
- By Active Directory synchronization – see the procedure detailed in article: [Synchronizing Users from Active Directory](#) on page 5.

## Account Creation Generalities

### Grouping

During the user account creation process, the administrator will have to select a group for the user. For more information on the purposes of groups, see [Managing Groups](#) on page 3

### Fax Number Assignment

If the Enterprise Account includes the Fax Service, the administrator may need to assign the user to an available fax number. This can be done either during the user account creation process or afterwards. For more information about fax number assignment, see [Managing Fax Numbers](#) on page 22.

### Notifications

Users are always and automatically notified by email when the system requires to interact with them.

Also, when a user account creation is complete, the concerned user receives an account creation confirmation email (one per subscribed service) with all information to connect to the portal and get started with each service.

## Adding Users by Invitation

This method is the best (and recommended) use case for creating single or multiple user accounts from scratch. It allows the administrator to invite several users (in one shot) to create their account. The administrator needs to enter minimal information and the invitation process lets users complete their account creation by themselves.

The invitation form can be accessed by administrators via the **Users** page or the **User Invitations** page. Here is a summary of the invitation process:

1. The administrator enters the email addresses of the users to invite, adjusts the available settings and sends the invitations.
2. All recipients receive an email invitation with a link to a self-enrolment form they will use to create their account.
3. Once invitations are sent, the list of invitees is shown in the **User Invitations** page. Each invitation is listed here until the invitee completes the account creation.

## Adding Users by Direct Creation

This method provides a way to create user accounts one by one without having to wait for users to respond to an invitation. It also allows the administrator to fully manage the user account settings at creation.

The user account creation form is accessed by administrators via the **Users** page. The minimum required fields and options to set are marked with an asterisk (\*), and the account is created once the administrator validates the settings by clicking **Add** at the bottom of the page.

## Modifying User Accounts

Once user accounts have been created, their username and email address cannot be modified. The role and group can only be changed by an administrator and all other information and settings can be changed by the users themselves (with some exceptions in Active Directory synchronization context).

- Users can access and modify their own settings via the **User Profile** page; they can change their own password under the **Change Password** page.

- Administrators can manage all existing user accounts via the **Users** page (access and modify user settings, delete user account, change user password or request user password change by email).

## Managing Groups


*A description of groups (and faxing profiles) and how to manage them.*

### What is a Group?

A group is a collection of users and fax numbers that has the following purposes:

- Users categorization for organization regroupment purposes (e.g. a department).
- Users association to a set of predefined properties (depending on the subscribed services).
- Service usage billing based on the group's users (and fax numbers, if any).

By design, a user always belongs to a group, and a fax number always belongs to a group.

 **Note:** Users and fax numbers may be found in a same group, but they have no direct relationship (in fact, specific user/fax number configurations must be performed by the administrator – see [Managing Fax Numbers](#) on page 22).


### Group Management

Groups are managed by administrators via the **Groups** page of the account portal. The group tagged as **Default Group** is the one that will be pre-selected by default at new user or new fax number creation. There can be only one default group among your available groups – but you can change it.

### Groups in the Context of the Fax Service

In the context of the Fax Service, a group has the following specific purposes:

- Users association to a faxing profile.
- Outbound usage billing based on the users of the group who send faxes.
- Inbound usage billing based on the fax numbers of the group that receive faxes.

 **Note:** Having users and fax numbers in the same group can be useful to keep some kind of consistency in the Fax Service billing process.

### What is a Faxing Profile?

A faxing profile is a collection of properties (cover sheets, phone books, faxing/security options...) that will be applied to several users for faxing purposes. All users associated to the same faxing profile will share the same faxing properties.

### Relationship between Groups and Faxing Profiles

Users are always associated to a faxing profile through the group to which they belong. More precisely:

- When you ensure to have a group and a faxing profile that bear the same name, they are automatically associated.
- When a group exists but no faxing profile bears its name, it is automatically associated to the default faxing profile (**Basic**).

This means that, if you want to use a specific faxing profile for a specific group of users, you only need to create a new faxing profile that bears the same name as the targeted group.

## Faxing Profile Management

Faxing profiles are managed by administrators via the **Fax Settings** interface (see: **Profiles**). For more information on profiles and all their properties, consult the Fax Settings online help (**Help ► Fax Administration Help**).

## Billing and Usage

### Billing Scheme: Subscription vs. Prepaid

The billing of your services will be performed according to your type of enterprise account (set up at your account creation):

#### Subscription Mode

If your account was set in *Subscription* mode, you will receive monthly invoices (according to your billing period) for your service usage and any other charges\* related to your subscribed plan.

Payments and adjustments will be made according to your preferred payment method, and statements are available through the **Statements** page of your Web portal.

#### Prepaid Mode

If your account was set in *Prepaid* mode, you will always need to have credits in advance in your account in order to benefit from the service.

Credits can be obtained by purchasing a Voucher through your reseller. A Voucher consists of a unique alphanumeric key (Voucher Code) and contains a predefined amount of credits. It has a predefined lifetime that starts once you redeem the Voucher by entering the code in your Web Portal. The credits can then be consumed until they expire according to the Voucher's lifetime.

Credits will be consumed on a daily basis for your service usage (according to a predefined credit rate) and on a monthly basis for any other charges\* related to your account. All credit transactions are listed in the **Credit History** page, where you can also redeem your purchased vouchers (for more details, see [Adding Fax Credits using a Voucher Code](#) on page 32).

\* For example, charges for your inbound DIDs (see [Managing Fax Numbers](#) on page 22) or for the retention of your faxes (see [Fax Retention](#) on page 27).


### Resources Available in your Web Portal

Several pages about your service usage and billing are available in your Web portal (only to your account administrators).

#### Fax Usage Reports

The **Usage Summary** page displays fax usage as a bar graph for a given billing period. It also contains a summary table showing the received and sent faxes by Group. Clicking on any number in the table brings to the **Usage Detail** page showing you the details of this specific fax category (received or sent and for which Group).

The **Usage Detail** page lets you view the sent faxes per user or the received faxes per fax number, for a given billing period and for one Group in particular (or all Groups). In the sent fax view, the user names are shown, whereas in the received fax view, the fax numbers are shown.

 **Note:** In both pages, you have the choice to report your usage either following your billing cycle or by calendar month. Usage is calculated and billed according to your billing time zone (preset at your account creation).

### Statements (Subscription Mode Only)

The **Statements** page displays all your past account statements with the most recent one on top. For each past billing period, you can view the new charges added and the balance forward.

Several options are available to get more statement information: **View** the statement in web page version, download **PDF** version, or **Download CDR** to get a csv file of the call detail records (in **More Actions**).

### Credit History (Prepaid Mode Only)

The **Credit History** page displays all credit transactions performed on your account, latest on top (with your current credit balance). This page also provides an estimate of your remaining credit lifetime, based on your average usage.

If you want to add credits to your account, you need to purchase a Voucher first. Once you obtained a Voucher Code, you just need to enter it through the **Redeem a Voucher Code** link available on the **Credit History** page.

## Requesting a Copy of Your Account Data


At any time, you can obtain a copy of all fax data that is still retained in your account (subject to specific conditions and fees).

### Details and Fees

Any requested copy of your data will be charged at the prevailing rate of the XMedius Cloud Services.

One package will be provided for each service for which you requested the data, with the following content:


- Fax Service: all stored fax records (i.e. the whole database containing the fax metadata) and fax images (i.e. the fax pages).
- SendSecure Service: the decrypted versions of all files stored in SafeBoxes and all related SafeBox Audit Records (PDFs).

 **Note:** The packages will only include the data that is still retained on our servers at the time the copy is performed (according to your retention scheme).

### How to Request Data Copy


Simply open a support request (<https://support.xmedius.com/hc/requests/new>) and clearly express your needs, specifying "Account Data Copy Request".

You will then be contacted by the XMedius Cloud team, which will guide you through the process.

 **Important:** In a context of XMedius Cloud **account termination**: your data will be kept for **30 days** after your account has been terminated. After this delay, all data will be permanently deleted without further notice and it will no longer be possible to provide you with a copy of it. Thus, it is necessary to initiate any data copy request before the end of this period.

# Business Environment Integrations

## Synchronizing Users from Active Directory

 **Note:** The instructions provided in this article apply to an installation of the AD Sync tool on a Windows server.

## Introduction

You can synchronize your Active Directory User database into your Enterprise Account, via the AD Sync tool (a Python script, installed and executed from your network) that was developed for this purpose.

### Synchronization Behavior

During the synchronization (through secure requests):


- All user creation/modification/deletion actions performed via Active Directory will be replicated toward your Enterprise Account.
- Any user *Disabled* in Active Directory will be deleted on your Enterprise Account.
- If you subscribed for the Fax Service, all assignments/unassignments of fax numbers to user accounts will be applied in your Enterprise Account.

For more specific behaviors to be aware of before using the AD Sync tool, see [Before running the script](#) on page 10.

### Scheduled Synchronization

You may require to execute the synchronization script at regular intervals, in order to automatically keep your Enterprise Account up-to-date according to changes occurring in your Active Directory. To achieve this, it is possible to add the script execution command to a scheduled task, for example using the Windows Task Scheduler.

## Planning (Before you Begin)

 **Important:** Read carefully the following before going forward with the AD Sync tool implementation.

1. **Prepare** your Active Directory and your Enterprise Account environments for a proper synchronization:
  - see [Preparation](#) on page 6
2. **Install** the AD Sync tool.
  - see [Installation](#) on page 8
3. **Configure** the AD Sync tool.
  - see [Configuration](#) on page 8
4. **Execute** the AD Sync script – manually or through a scheduled task.
  - see [Running the script](#) on page 10


## Preparation

### Create groups in your Enterprise Account

Each synchronized user will be necessarily assigned to a **Group** in your Enterprise Account (see [Managing Groups](#) on page 3).


If you wish to divide users into several groups, you must pre-create them in your Enterprise Account. The AD Sync tool can be configured to determine group names using one of these methods:



- **By default:** use the name of the smallest user object containers.
    - For example: with users `CN=username,OU=Accounting,DC=example,DC=com` and `CN=username,OU=Support,DC=example,DC=com`, the names of the groups would be "Accounting" and "Support".
  - **Alternative choice:** use the value of a specific attribute of the user objects.
    - For example: if you choose the user attribute "l" for this (to group users by location/city) and the value of this attribute is "New York" or "Montreal" depending on the user, the names of the groups would be "New York" and "Montreal".
-  **Important:** The setup corresponding to this choice will be done in a configuration file through a further step of this procedure. However, everything must be perfectly preset for a good match between your Active Directory grouping elements and your Enterprise Account groups. Otherwise users will be assigned to the default group defined in your Enterprise Account.

### Verify email addresses in your Active Directory

E-mail Addresses must exist in all user accounts among the concerned Active Directory users.


 **Attention:** Users without an e-mail address will not be imported to your Enterprise Account.

### Arrange your fax number assignment plan

If you subscribed for the Fax Service, the assignment of fax numbers with users can be done automatically through the AD Sync script.

Here are the conditions to respect:


1. The fax numbers must have been added to your Enterprise Account prior to running the script (see [Managing Fax Numbers](#) on page 22).
2. The `facsimileTelephoneNumber` attribute of each Active Directory user targeted for fax number association must contain one of these fax numbers (if needed, it is possible to map the fax number to another Active Directory attribute by modifying the AD Sync script configuration file).

 **Important:** Fax numbers entered in your Active Directory do not need to have a specific formatting, as long as all their numeric digits (including country code) match fax numbers of your Enterprise Account. For example, 15551234567 or 1-555-123-4567 in Active Directory will match +1 (555) 123-4567 in the Enterprise Account.

The assignment mechanism behavior will then be the following:


If the fax number...	The user...		And the user...	
is tagged <b>Individual</b> in your Enterprise Account	will be assigned to the number...	for automatically receiving incoming faxes.	will use this number...	as the originating number of his outgoing faxes (shown as the "from" number of cover sheets and set as the originating number on the fax call).
is tagged <b>Shared</b> or is the <b>Main Number</b> in your Enterprise Account	will NOT be assigned to the number...			
does not match an existing number of your Enterprise Account			will use the Main Number (when set)...	

## Installation

 **Note:** It is not required to have the script installed on the Active Directory server directly. Any computer on the network that can access both your Active Directory server and the Internet can run the script, as long as it is allowed to perform outbound TCP connections to your Enterprise Account (https, port 443) and queries to the Active Directory LDAP interface (LDAP, 389 by default).

1. Install the **32-bit** version of Python 2.7.3.


Download available here: <https://www.python.org/download/releases/2.7.3/> – search for **Windows x86 MSI Installer (2.7.3) (sig)**.

 **Note:** More recent *minor* Python versions – i.e. 2.7.x, with  $x > 3$  – should also be supported, however they have not been officially tested with the AD Sync tool.

2. Download the latest version of the AD Sync package file (see [Download page](#)).

3. Decompress the file in the folder or your choice (<adsync\_home>).

You can now configure the AD Sync tool according to your needs (see the procedure below).

 **Important:** If you need to modify the Python modules (.py files) for further customization, make sure they are saved in UTF-8 format.

## Configuration

1. Create an Access Token that will be used for allowing the AD Sync script to manage your user directory:


a) From your Enterprise Account, select **Access Tokens** via the navigation bar.


b) Create an Access Token with the two following permissions:

- **Manage users**
- **Query user directory**

c) Copy the created token string for use in the following configuration.

2. Edit the AD Sync tool's configuration file: <adsync\_home>\config\default.yaml:


 **Note:** Enter functional values to replace comments starting with #####, always keeping one space character after the colon.

 **Important:** All line indentations must be kept unchanged as they define the functional structure of the file.

a) Configure connection and access settings for your Enterprise Account:

You need to enter:

- The full URL used to reach your account on the Cloud platform (in the form `https://portal.[domain]/enterprises/[enterprise_account]`), and
- The above created Access Token.

 **Note:** Use the *[domain]* that corresponds to the region of your enterprise account (i.e. `xmedius.com` for North America or `xmedius.eu` for Europe).

For example:

```
fax_service:
  address: "https://portal.xmedius.com/enterprises/exampleinc"
  access_token: 193e6f8bd084xxxxxx3c565bedbxxxxxx
```

b) Optionally [since AD Sync version 1.0.4], you can disable the automatic sending of welcome/password setup emails to newly created users (enabled by default):

- To disable welcome/password setup emails, set the value:

```
disable_emails: true
```

- Default value is `false`.


c) Configure connection and authentication settings for your Active Directory:

You need to enter:

- The address of your LDAP server (Active Directory),
- The name of an account with read only privileges on your Active Directory and on the Deleted Objects container, and
- The password of the user specified above.

For example:

```
active_directory:
  address: ADServerName
  port: 389
  username: Domain\User
  password: UserPassword
```

 **Important:** If you want the AD Sync script to remove accounts that have been deleted, the user specified here must also have read privileges on the Deleted Objects container. In a typical Active Directory deployment, non-administrator users cannot read the Deleted Objects container. To grant this access, refer to *Changing permissions on a deleted object container* at [http://technet.microsoft.com/en-us/library/cc816824\(v=ws.10\).aspx](http://technet.microsoft.com/en-us/library/cc816824(v=ws.10).aspx).

d) Configure the search parameters to retrieve users (and deleted users) in your Active Directory:


```
#Below are default search parameters for active directory
search_nodes:
```


There are two query sections to configure carefully according to your needs/policies:

- The `query_for_users` section is intended to target the only containers in which user creations and modifications will be synchronized to your Enterprise Account – through one or several queries.

For example:

```
query_for_users:
  -
    base: "CN=Users,DC=example,DC=com"
    scope: "SUBTREE"
    filter: "(&(objectCategory=person)(objectClass=user))"
```



 **Remember:** Any Active Directory *Disabled* user found through this query section will be deleted from your Enterprise Account at the next synchronization.

 **Important:** If a user is moved out of any of the queried containers between two synchronizations, it will become – and remain – an unsynchronized orphan in your Enterprise Account, whatever happens with the user on its new Active Directory location.

- The `query_for_deleted_users` section is intended to target the containers regrouping users that are identified as "deleted" on the Active Directory side and need to be deleted from your Enterprise Account.

For example:

```
query_for_deleted_users:
-
  base: "CN=Deleted Objects,DC=example,DC=com"
  scope: "SUBTREE"
  filter: "(&(objectClass=user)(isDeleted=TRUE))"
```

-  **Tip:** For more advanced information on AD Sync tool queries (e.g. to extend/refine searches using multiple queries or by defining exclusions), see [User Query Options](#) on page 12.
-  **Restriction:** LDAP referrals are not supported by the AD Sync tool. Any LDAP referrals returned by the queried base will be skipped.

- e) You can optionally modify the mapping between your Enterprise Account attributes and your Active Directory attributes (see [Attribute Mapping](#) on page 13).

## Running the script

The AD Sync script can be run:

- Manually (see [Running the script manually](#) on page 11)
- Automatically (see [Running the script through the Windows Task Scheduler](#) on page 11)


A synchronization log file is also available for troubleshooting purposes (see [Log File](#) on page 12).

## Before running the script

Please note and remember the following before running the AD Sync script.

### First Synchronization


The first time the script will be executed, all targeted Active Directory users will be imported into your Enterprise Account. In the XMedius Cloud portal interface, all these users will appear with the tag **External User**.

 **Note:** The first synchronization may take some time to complete, depending on the number of users.

All users will receive an email to configure their XMedius Cloud user account password (which is not managed through Active Directory) – unless you disabled the sending of such emails.

### Subsequent Synchronizations


From the second execution of the script, only the users that were added, modified or deleted in your Active Directory will be synchronized to your Enterprise Account (and tagged **External User**).

 **Attention:** It is not recommended to alter the search queries within the AD Sync tool configuration file between two synchronizations. This would lead the 'changes counter' in the AD Sync tool database to become invalid and result in unexpected synchronization behaviors.

If a query change is however required, you can delete the `database.db` file from the `<adsync_home>` folder in order to reset the counter and perform the whole synchronization of all users and assignments at the next execution of the script.

## User Management

You can choose to further modify the synchronized users (tagged **External User**) either through subsequent executions of the AD Sync script, or directly through the XMedius Cloud portal interface.

 **Important:** A subsequent execution of the AD Sync script will override any modification that was performed through the XMedius Cloud portal interface. That said:


- The override will only occur on users whose object was modified on your Active Directory (unless a full synchronization occurs, which will reset all users).
- Only the properties included in the AD Sync mapping configuration (see [Attribute Mapping](#) on page 13) will be overridden.


However, to modify user properties such as the **Role** or the **Time Zone** (both not included by default in the mapping), you will necessarily need to do it from the XMedius Cloud portal interface.

You can still create additional users via the XMedius Cloud portal interface (i.e. outside of the AD Sync scope), but these users will need to be fully managed afterwards via the portal (they will not be affected by the AD Sync script). You will easily recognize such users as they will not be tagged **External User**.

## User Deletion

The mechanism of deletion of cloud user accounts highly depends on your company processes and on the way you implemented the queries within the AD Sync tool configuration file (see [List item](#) on page 9).

 **Note:** When a user is deleted, his faxes are not removed from the cloud system (as long as they are retained according to your fax retention scheme – see [Fax Retention](#) on page 27). Therefore, if the user is re-added to the Active Directory and the AD Sync script runs again, that user will be re-associated to his faxes, provided his e-mail address is set in Active Directory exactly as it was initially.

 **Attention:** If you delete any synchronized user directly from the XMedius Cloud portal interface, this will remove the user's access and the visibility of that account in the portal. The account will not be automatically re-inserted to the enterprise at the next synchronization.

However in that situation, if you modify the user's object from your Active Directory, the AD Sync script will detect the modification and re-create the user account in the Enterprise Account. The user will then receive a new invitation email to complete the account creation (unless you disabled the sending of such emails).

## Running the script manually

You can run the script manually using the following command line from the folder where the AD Sync script resides:

```
<python_home>\python.exe adsync.py
```

If you want to run the script using a different configuration file (e.g. `new_config.yaml`):

```
<python_home>\python.exe adsync.py <path>\new_config.yaml
```

## Running the script through the Windows Task Scheduler

You can run the script as a planned event in the Windows Task Scheduler.

1. Create a scheduled task with the following properties:
  - The script must run using an account with full control over the folder containing the script file.
  - Ensure to select the option to run whether the user is logged on or not.
2. Add the following action configuration:

- **Action:** Start a program
- **Program/script:** `<python_home>\python.exe`
- **Add arguments:**
  - `adsync.py` (mandatory)
  - `<path>\new_config.yaml` (optional, if you need to use a different config file)
- **Start in:** `<adsync_home>`

## Log File

The script produces a log file in the `<adsync_home>\logs` folder containing the various synchronization results.

## Advanced/Optional Configurations

### User Query Options

Some options are available when configuring the queries to retrieve users and deleted users from your Active Directory for synchronization to your Enterprise Account.

All of them apply to both the `query_for_users` and `query_for_deleted_users` sections found in the AD Sync tool's configuration file (see [List item](#) on page 9).

### Multiple User Queries

You can extend your queries by using several search nodes within the same section (`query_for_users` or `query_for_deleted_users`).

A search node contains 3 elements (`base`, `scope`, `filter`) and always starts with a dash ("-") in its own line), as shown below:

```
-
  base: "<base_1>"
  scope: "<scope_1>"
  filter: "<filter_1>"
-
  base: "<base_2>"
  scope: "<scope_2>"
  filter: "<filter_2>"
-
  base: "<base_3>"
  scope: "<scope_3>"
  filter: "<filter_3>"
```

 **Important:** Pay special attention to line indentations as they define the functional structure of the query.

### Excluding Users from Queries


You can exclude users from a query, based on values found in the Active Directory user attributes. As 4th search element within the query, enter the exclusions using the following syntax:

```
-
  base: "<base>"
  scope: "<scope>"
  filter: "<filter>"
  exclusion :
    <AD_attribute_1> :
```

```

- "<value_or_pattern_1_1>"
- "<value_or_pattern_1_2>"
<AD_attribute_2> :
- "<value_or_pattern_2_1>"
- "<value_or_pattern_2_2>"

```

 **Important:** Pay special attention to line indentations as they define the functional structure of the query.

Wildcards are supported in the values to match. Logical operator `OR` will be applied between criteria. For example:

```

exclusion :
  mail:
    - "FederatedEmail*"
    - "SystemMailbox*"
    - "DiscoverySearchMailbox*"

```

will exclude from the search all users whose email address was generated automatically by Active Directory.

## Attribute Mapping

If you need to change the mapping between your Enterprise Account attributes and your Active Directory attributes, you can do it through the section `attributes_mapping` found in the AD Sync tool's configuration file (see [List item](#) on page 8):

```

#Attribute mapping for portal attributes vs active directory attributes
attributes_mapping:


```

- The following mapping is used to assign the users to a **Group** in your Enterprise Account by retrieving a relevant value from your Active Directory:

```

group_id: "ExtractGroupNameFromDn"

```

 **Note:** The default attribute `"ExtractGroupNameFromDn"` automatically extracts the name of the second to last element in the user's Distinguished Name. This corresponds to the smallest container in which the user object is stored. For example, in `CN=username,OU=Accounting,DC=example,DC=com`, it will return the value: `Accounting`.

Otherwise, you can use an attribute of the Active Directory user object instead, for example: `"department"`. You must however ensure that the chosen Active Directory attribute will contain a relevant value for all user objects.

- Unless you have specific needs, the rest of the mapping should remain as provided in the configuration file:


```

address: "streetAddress"
city: "l"
company_name: "company"
country: "co"
email: "mail"
external_id: "objectGUID"
first_name: "givenName"
job_title: "title"
language: "preferredLanguage"
last_name: "sn"
main_fax_number_id: "facsimileTelephoneNumber"
mobile_number: "mobile"
phone_number: "telephoneNumber"
state: "st"
username: "sAMAccountName"
zip_code: "postalCode"

```


## Enabling User Single Sign-On (SSO) using AD FS

This article explains how to integrate your Enterprise Account with Active Directory Federation Services (AD FS) in order to enable user single sign-on (SSO).

 **Note:** This article is intended for Enterprise Account Administrators.

### Purpose

Administrators can enable Single Sign-On (SSO) for their users, using AD FS – with the WS-Federation protocol (SAML protocol is not supported).

 **Note:** Supported versions: AD FS 2.1 and higher / Windows Server 2012 and higher.

With this functionality enabled, all users of the Enterprise Account will be able to log in to their XMedius Cloud account (including all subscribed services) using their Active Directory user credentials.

This article:

- describes all configurations to perform ([SSO Configuration](#) on page 14) on your AD Server as well as on your Enterprise Account in order to enable the SSO functionality, and
- provides specific information for creating user accounts ([User Accounts in SSO Context](#) on page 16), which is still necessary when the SSO functionality is enabled.

### SSO Configuration


To enable SSO, it is required to perform configurations on your AD Server as well as on your Enterprise Account (for which you need to provide some values retrieved from your AD FS).

### AD Server Configuration

Setup AD FS role, Relying Party Trust and Claim Rules on your AD Server:

1. Setup the AD FS role on your AD Server, according to Microsoft's instructions.
  - a) Install the AD FS role.
  - b) Setup firewalling/NATing, DNS, public certificates according to your corporate environment/policies.
2. Configure a Relying Party Trust using the AD FS Management console:

Go to **Trust Relationships** and add a **Relying Party Trust** with the following minimum required properties (follow the wizard):

<b>Select Data Source</b>	Select <b>Enter data about the relying party manually</b>
<b>Choose Profile</b>	Select <b>AD FS Profile</b>
<b>Configure URL</b>	Select <b>Enable support for the WS-Federation Passive Protocol</b>
	Provide the <b>Relying party WS-Federation Passive protocol URL</b> : <code>https://login.[domain]</code>
	 <b>Note:</b> Use the <code>[domain]</code> that corresponds to the region of your enterprise account (i.e. <code>xmedius.com</code> for USA, <code>xmedius.ca</code> for Canada or <code>xmedius.eu</code> for Europe).



<b>Choose Issuance Authorization Rules</b>	Select <b>Permit all users to access this relying party</b>
--	---

 **Tip:** Before finishing, select **Open the Edit Claim Rules dialog...** to directly step on the next required configuration.

### 3. Add a Claim Rule to the Relying Trust Party you just created:

In **Edit Claim Rules, Issuance Transform Rules** tab, add a rule with the following minimum required properties (follow the wizard):

<b>Choose Rule Type</b>	Select <b>Send LDAP Attributes as Claims</b>
<b>Configure Claim Rule</b>	Select <b>Active Directory as Attribute Store</b>
	Set <b>Mapping of LDAP attributes to outgoing claim types</b> : User-Principal-Name to E-Mail Address

## AD FS Values Required for Further Configuration

You need to get some values from your AD FS in order to use them while configuring your XMedius Enterprise Account for SSO.


1. Get the Thumbprint of your Token-Signing certificate:
  - a) Go to **AD FS > Service > Certificates**.
  - b) Locate the **Token-signing** certificate and open it.
  - c) Go to **Details** and get the value of **Thumbprint**.
2. Get the Federation Service Identifier:
  - a) Go to **AD FS > Service** and **Edit Federation Service Properties**.
  - b) Get the value of **Federation Service Identifier**.

## Enterprise Account Configuration

Enable the SSO functionality in your Enterprise Account:

1. Login to your XMedius Cloud account using a Web browser.
2. Edit your **Enterprise Settings**
  - a) From the main menu of your Web Portal, select **enterprise\_account > Enterprise Settings**.
  - b) Go to **Single Sign-On** section and select **WS-Fed / WS-Trust**.
  - c) Provide the following required information:

<b>Web Endpoint (URL)</b>	The URL to your AD FS login server. This URL will most likely end with <code>/adfs/ls</code> .
<b>Federation Service Identifier</b>	This is the Federation Service Identifier you previously retrieved.
<b>Token-Signing Certificate Fingerprint</b>	This is the Thumbprint you previously retrieved.

 **Important:** Keep the fail-safe URL (`https://login.[domain]/[account]/no-sso`) provided at the bottom of the SSO configuration section, it will allow you to log in using your XMedius Cloud account credentials if you lock yourself after SSO activation.

## User Accounts in SSO Context

Even with SSO functionality enabled, it is always required to create user accounts within the Enterprise Account. SSO will apply to all user accounts created either before or after enabling the functionality.

You must also be aware of some behaviors and requirements related to SSO activation (Password / Email Address Required to Log in / Two-Factor Authentication).

### Creating User Accounts


A tool (AD Sync) can be used to ease the user account creation process by synchronization with your Active Directory (see [Synchronizing Users from Active Directory](#) on page 5).

Otherwise, the XMedius Cloud Platform always allow administrators to create user accounts, either manually or by sending invitations (see [Managing Users](#) on page 1).

### Password

In SSO context, users won't need a password dedicated to their XMedius Cloud account (even if such a password can technically be defined) because they will use the password of their corporate (AD) account. As such:

- Administrators have the option to manually create user accounts with no password.
- The form to create an account following a User Invitation does not ask users to set a password.

 **Note:** If you are using the AD Sync tool, it is recommended to set the option `disable_emails`, which disables the automatic sending of password setup emails to newly created users.

### Email Address Required to Log in

In SSO mode, the key element of a user account is its email address. As such, to login using client applications (e.g. SendFAX, SendSecure for Outlook...) as well as to access the Web Portal, the users will have to authenticate using their email address (and not the username defined in their XMedius Cloud account).

### Two-Factor Authentication

In SSO context, XMedius Cloud user accounts cannot be configured for Two-Factor Authentication (2FA). However, your AD FS technically allows to enable 2FA on its side.

# Chapter 2

# Fax Service

## User Instructions

### Sending Faxes: Overview

*An introduction to all faxing means available when using the Fax Service (XMediusFAX Cloud).*

### Sending Faxes

The Fax Service offers you several ways to send faxes.


- Some are available by default; see [Faxing using the Default Available Means](#) on page 18
- Other applications, tools or devices can also be used, subject to additional installations or configurations that may require to be accomplished by your administrator; see:
  - [Faxing using Windows Applications/Tools](#) on page 18
  - [Faxing via Advanced Email Features](#) on page 20
  - [Faxing from External Devices](#) on page 21

### Viewing Sent Faxes

Regardless to the faxing means used, you can always follow the fax submission progress in the **Outgoing Queue** folder of the Web Portal (**Faxes** page).

Depending on the account configuration, you may also receive fax delivery confirmation emails upon success or failure of fax delivery.

After submission, all your sent faxes are stored in the **Outbound History** folder.

 **Important:** Stored faxes may be automatically deleted after a certain time. The fax retention policy depends on your Fax Service agreement.

### Documentation

Detailed information about all the faxing means described below is available in a common User Guide.

- A PDF version of this User Guide is automatically made available when any of the bundled client applications is installed (see [Faxing using Windows Applications/Tools](#) on page 18). It can be found in the following location:  
<hard\_disk>\Program Files (x86)\XMediusFAX\Doc.
- Applications also have integrated help topics available from their menu.

## Faxing using the Default Available Means


*How to send faxes via the means that are available by default with your Fax Service.*

The following faxing means are available by default with the Fax Service.

### Email Client (Basic Faxing)

You can send faxes using your email client:

- Simply send an email to `fax_number@domain`.
- Email message and attached documents will be converted to fax pages.

 **Note:** In the "To" field:

- The `fax_number` should be formatted according to the international format (E.164);
- The `domain` depends on the region of your enterprise account : `xmedius.com` for North America, or `xmedius.eu` for Europe.

Some examples of fax addressing:

- `+15551234567@xmedius.com` (from NA enterprise account to NA destination)
- `+33141234567@xmedius.com` (from NA enterprise account to Europe destination)
- `+33141234567@xmedius.eu` (from Europe enterprise account to Europe destination)
- `+15551234567@xmedius.eu` (from Europe enterprise account to NA destination)

For more details and options on sending faxes by email, see the User Guide available with the downloadable client package (see <https://support.xmedius.com/hc/en-us/articles/203824826>).


### Web Client

Your Web portal offers a section to compose and send faxes:

- Click **Compose Fax** (top left button), then fill the fields, add attachments and send the fax.
- More information can be found through **Help ► Faxing Help** in the portal menu.

## Faxing using Windows Applications/Tools

*How to send faxes via dedicated Windows applications and tools that are available for download.*

 **Note:** This topic is specifically intended for end-users. If you are an administrator, see [Fax Integration with Windows Clients](#) on page 46 instead.

Several Windows client applications and tools can be downloaded and installed on a user workstation. This section quickly describes the ones and explains how to install and use them.

All these client applications and tools (and their documentation) are available in: English, French, German, Spanish, Italian, Portuguese, Russian and Chinese.

## Downloading/Installing the Client Applications

The Client Installer can be downloaded from the XMedius Cloud Help Center, section **Technical Support ► Software and Tools**.

See <https://support.xmedius.com/hc/en-us/articles/203824826> for all download/installation instructions.

## Using the Client Applications

### SendFAX

SendFAX is a Windows application used to compose and send faxes. It also provides a means of viewing, annotating and reordering the pages of the documents to be faxed. A local phone book for SendFAX is available in option.

- SendFAX (and its local phone book) can be installed by selection through the downloadable client installer.
- To use SendFAX, launch **Start ► All Programs ► XMediusFAX ► SendFAX**, compose your fax and send it.

### XMediusFAX Printer

Using that printer from a desktop application locally converts the current document into a TIFF file in order to open it in SendFAX and fax it. Accessed this way, SendFAX may either be displayed with its full interface or with a minimal interface for quick faxing.

- The XMediusFAX printer is automatically installed along with SendFAX.
- To use the XMediusFAX printer, open the document to fax in its native application and print it (to SendFAX) by selecting **XMediusFAX** via the application's printing options.

### Web Fax Composer Printer

Using that printer from a desktop application locally converts the current document into a TIFF file in order to fax it via the Web Client. The Web Client Compose feature is then launched with the TIFF file included (uploaded) as an attachment.

- The Web Fax Composer printer can be installed by selection through the downloadable client installer.
- To use the Web Fax Composer printer, open the document to fax in its native application and print it by selecting **Web Fax Composer** via the application's printing options.

### Print To Mail

Using that printer from a desktop application locally converts the current document into a TIFF file in order to fax it via email. Thus, an email creation window opens with the TIFF file included as an attachment.

- The Print To Mail printer can be installed by selection through the downloadable client installer.
- To use the Print To Mail printer, open the document to fax in its native application and print it by selecting **Print To Mail** via the application's printing options, then follow your usual way to address the email to a fax number.

## Fax Merge Functionalities

Fax merge features can be made available in Microsoft Word and OpenOffice.org Writer applications, to allow you broadcasting faxes using a fax recipient database.

- All elements allowing the integration of the fax merge functionalities are automatically installed through the downloadable client installer. It requires however some configuration to be performed afterwards by the administrator (see [Installing the Fax Merge Macros \(MS Word and OpenOffice.org\)](#) on page 47).
- To use these functionalities, please refer to the User Guide (available with the installed applications).

## Faxing via Advanced Email Features

*How to send faxes via advanced email features available with your Fax Service (if enabled by your administrator).*

### Microsoft Outlook (through Microsoft Exchange)

When you are using Microsoft Outlook connected to the Microsoft Exchange Server of your company (refer to your administrator to know this), the fax addressing syntax is slightly different from basic faxing via email, though the global behavior is the same:

- This functionality may depend on configurations performed by the administrator.
- Simply send an email to `[FAX: fax_number]`.

### Fax Form for Microsoft Outlook

A dedicated fax composition form can be made available from your Microsoft Outlook, to benefit from more advanced faxing features that are not available in a regular email composition interface.

- To be available, this feature requires some configuration to be performed by the administrator (see [Fax integration with Microsoft Exchange/Outlook](#) on page 37).
- To use this feature:
  1. Reach and open the form called **Composition** located in the **Organizational Forms Library** (Look in dropdown list):
    - For Outlook 2007 (and previous versions), follow **Tools** ► **Form** ► **Choose Form**
    - Since Outlook 2010, follow **Home** ► **New Items** ► **More Items** ► **Choose Form**
  2. Send the form to `[FAX: fax_number]`

### Fax Form for IBM Lotus Notes

A dedicated fax composition form can be made available from your IBM Lotus Notes, to benefit from more advanced faxing features that are not available in a regular email composition interface.

- To be available, this feature requires some configuration to be performed by the administrator (see [Fax integration with IBM Notes and Domino](#) on page 40).
- To use this feature, click on **New Fax** under **Views** ► **Fax**

## Microsoft Office Internet Fax Service

Microsoft Office programs include a built-in functionality allowing you to send faxes via a dedicated form to an Internet fax service provider (thus, your Fax Service).

- To be available, this feature requires some configuration to be performed by the administrator, and also requires Microsoft Outlook to be installed on your computer (see [Configuring the Microsoft Office Internet Fax Service](#) on page 49).
- To use this feature, open a Microsoft Word, Excel or Powerpoint file in its native application and reach the Internet Fax Service form:
  - With MS Office 2007: **Office Button** ► **Send** ► **Internet Fax**
  - With MS Office 2010: **File** ► **Save & Send** ► **Send Using E-mail** ► **Send as Internet Fax**


## Faxing from External Devices

*How to send faxes via external devices such as your smartphone, your tablet or a Multi-Function Printer (with or without a dedicated XMediusFAX Connector/App)*


### Faxing from your Mobile Device

Your smartphone and your tablet can be used to easily fax documents from anywhere through your Fax Service; two full featured applications are available: for iPhone/iPad and for Android phone/tablet.

Simply search for **XMediusFAX** in iTunes or Google Play, and install the app on your mobile device.

 **Note:** The app requires a quick first-time setup: you just need to select the XMediusFAX Cloud service (blue icon) and enter your Enterprise Account that you received by email after your registration to the XMediusFAX Cloud service.

1. Ensure that your mobile device has an access to the Internet.
2. Open the **XMediusFAX** application.
3. Use your embedded camera to scan your documents, or select documents from your local/cloud file storage location.
4. Add recipient(s) and send the fax.

 **Note:** Among other additional options, you can:

- Select contacts from your mobile device (if they have a fax number) or your XMediusFAX Phone Book, and manage favorites.
- Personalize your fax and change fax options before sending the fax.
- Delay the sending of the fax (scheduled date/time).

### Faxing from a Multi-Function Printer

Multi-Function Printers/Devices (MFP/MFD) can be used to fax your paper documents through your Fax Service, either via its embedded scan-to-mail functionality, or via a dedicated fax connector/app interface.

- 👉 **Note:** The availability of these features and the way to use them depend on the device implementation/configuration performed by your administrator (see [Integration for Faxing via MFPs](#) on page 51).

## Faxing by Email from an MFP

- 👉 **Note:** To use this method, your MFP must have a scan-to-mail functionality.

1. Prepare your documents to be scanned.
2. Simply send an email using the scan-to-mail functionality of the device (when available):
  - **To:** `fax_number@domain` (or only the fax number, depending on the device configuration).
  - **From:** the email address of your Cloud user account.

- 👉 **Note:** In the "To" field:

- The `fax_number` should be formatted according to the international format (E.164);
- The `domain` depends on the region of your enterprise account : `xmedius.com` for North America, or `xmedius.eu` for Europe.

Some examples of fax addressing:

- `+15551234567@xmedius.com` (from NA enterprise account to NA destination)
- `+33141234567@xmedius.com` (from NA enterprise account to Europe destination)
- `+33141234567@xmedius.eu` (from Europe enterprise account to Europe destination)
- `+15551234567@xmedius.eu` (from Europe enterprise account to NA destination)

## Faxing from an MFP using an XMediusFAX Connector/App

- 👉 **Note:** To use this method, the appropriate XMediusFAX Connector/App must be installed on your MFP.

1. Prepare your documents to be scanned.
2. Select the **XMediusFAX** button on the device home page.
3. Add recipient(s) and send the fax.

- 👉 **Note:** The scanning of your documents is managed through the faxing process. Just follow the on-screen instructions.

# Management (Enterprise Administrators)

## Managing Fax Numbers

*How to request and configure fax numbers for your enterprise account and how to manage user assignments.*



## Inbound Fax Numbers (used to receive faxes)

To be able to receive faxes, you need to have one or several Inbound Fax Numbers in your enterprise account and properly assign users to these numbers.

1. To request inbound fax numbers (regular DID's or toll-free numbers) for your enterprise account:
  - If you need **new numbers**, see [Requesting new Inbound Fax Numbers](#) on page 25.
  - If you need to **port existing numbers** from your current provider, see [Requesting the porting of existing Inbound Fax Numbers](#) on page 26.
2. To ensure the routing of faxes to their intended recipients, you need to configure your Inbound Fax Numbers by assigning users to them (see [Assigned Users](#) on page 24).

## Outbound Fax Numbers (used when sending faxes)

Users of your enterprise account do not need to have a fax number to send faxes (this functionality is inherent to the user account). However, when a fax is sent, an Outbound Fax Number is always used for caller identification purposes: this number will appear in the fax properties (as the ANI, or "From" number) and will be displayed on the fax cover sheet.

1. Conceptually, an Outbound Fax Number may be:
  - Any of the Inbound Fax Numbers of your enterprise account (as described above), or
  - An External Fax Number owned by your company but not serviced by the XMediusFAX Cloud Service – which can be requested and added as such in your account (see [Requesting External Numbers](#) on page 27) .
2. Practically, the users will be able to choose one of these Outbound Fax Numbers according to the way each number has been made available to them (or not), that is to say:
  - As an Individual Fax Number,
  - As a Shared Fax Number, or
  - As the Main Fax Number of the enterprise account.

For more details on these attributes, see below ([Main Fax Number](#) on page 23 and [Individual vs. Shared Fax Number](#) on page 24).

## Fax Number Attributes and Assignment

All the fax numbers added to your account are listed in the **Fax Numbers** page. All fax numbers can be configured independently (each one has its own set of attributes) and can be assigned to specific users (or not), according to your needs.

### Main Fax Number

The Main Fax Number represents the fax number of your organization as a whole. There can be only one Main Fax Number, which will be selectable by all users as their Outbound Fax Number.


The Main Fax Number can be set through the **Fax Numbers** page (above the list).

## Individual vs. Shared Fax Number

A fax number can be individual or shared. This determines whether it will be selectable only by assigned individuals or by all users as their Outbound Fax Number.

The sharing attribute can be set by accessing the fax number's properties page (**Edit**):

- **Shared** makes the fax number available to every user in the Enterprise as their Outbound Fax Number.
- **Individual** makes the fax number available only to its assigned users as their Outbound Fax Number.

 **Note:** This attribute (Shared/Individual) has no effect on the Main Fax Number, which always behaves as a shared number.


## Assigned Users

Any number of users (or none) can be assigned to a fax number. All users assigned to one number will automatically receive all faxes sent to this number.

The list of Assigned Users can be managed by accessing the fax number's properties page (**Edit**).

User assignment example scenarios:

- A user can be assigned to one fax number or several fax numbers, or no fax number at all. This has no impact on the user's ability to send faxes (which is inherent to the user account).
- A shared number may typically have a single user assigned, responsible to manually forward faxes to other users who expect to be contacted through this number (and who are typically not assigned to a fax number). For example, a departmental number can be assigned to a receptionist.

 **Note:** The service will receive faxes to numbers that are not assigned to any user; these faxes will be visible in the administrator's fax list (menu **Fax** ► **Monitor**) but no user will be notified that these faxes are received.

## Group

The Group attribute of a fax number can be used for internal management and classification of fax numbers. In the Call Detail Record generated at each billing cycle, the inbound pages are listed per fax number (rather than by assigned users), and the group is also included to ease your internal cost repartition.

Regardless of its group, the number can be made available to any user of any group, by sharing or assignment.

This attribute can be set by accessing the fax number's properties page (**Edit**).

For more details on:

- Groups: see [Managing Groups](#) on page 3
- Billing: see [Billing and Usage](#) on page 4

## Note

You can use the Note to describe the purpose of the number. This description will be simply displayed in the list of fax numbers to ease the management of the list.

This attribute can be set by accessing the fax number's properties page (**Edit**).


## CSID

The CSID (Called Station ID) is used to identify your side from the sender side when faxes are sent to this number. This can typically be the fax number itself (which is the case by default when the number is added to the list) or even a company name.

This attribute can be modified by accessing the fax number's properties page (**Edit**). Any change to the CSID does not affect the fax number itself (which cannot be changed).

## External Number

This attribute provides the information that the number was added as an External Number.

 **Remember:** An External Number belongs to your company and is not serviced through our platform. As such, it is not billable and can only be used as an Outbound Fax Number.

This attribute is shown as a checkbox within the fax number's properties page (**Edit**) and is also displayed as a tag in the list of fax numbers. It cannot be changed.

## Toll-Free Number

This attribute provides the information that the number is a toll-free number, and as such, is subject to a different billing rate than a regular number (DID).

This attribute is shown as a checkbox within the fax number's properties page (**Edit**) and is also displayed as a tag in the list of fax numbers. It cannot be changed.

## Ported Number


This attribute provides the information that the number was ported from another provider to the XMediusFAX Cloud Service. By opposition, numbers that have been requested as "New Numbers" will not show this attribute.


This attribute is shown as a checkbox within the fax number's properties page (**Edit**). It cannot be changed, as it is inherent to the way the number was added to the list.

## Requesting Fax Numbers for your Fax Service

Before requesting fax numbers, you should carefully review all information included in the current article ([Managing Fax Numbers](#) on page 22), as your requests will depend on the way the XMedius Cloud Platform is implemented and on the context in which you are requiring fax numbers.


## Requesting new Inbound Fax Numbers

 **Important:** Each Inbound Fax Number added to your account will be subject to monthly charges.

 **Note:** The availability of numbers might be limited in some geographical areas. If the area code you request is not available, we will propose you an alternate one (close to your actual location), or a toll-free number.

- To request new **toll-free numbers**:

Contact our Customer Service Team by opening a support request (<https://support.xmedius.com/hc/requests/new>). You will then be guided through the whole process until the numbers are added to your account.

 **Remember:** The toll-free number usage is typically not included in base plans, and all charges and fax page rates for toll-free numbers are different (usually higher) than the ones for regular numbers (DIDs).


- To request new **regular numbers (DIDs)**:

1. In your Web portal, access the **Fax Number Requests** page and click the **Request New Numbers** link.
2. Fill-in the form with all information required.

The form allows you to specify the type and the amount of new numbers to obtain.

3. Submit the request.


Once the request is *Submitted*, our team is notified to process it.


 **Note:** You will be notified by email (as well as any other administrators of your account) each time the status of your request changes. If you need to communicate with our team about the request and follow-up its progress, please use the request's **Comments** page.

#### In the end:

- The request will result in the allocation of brand new numbers to your account.
- The added numbers will be immediately activated to receive faxes.


## Requesting the porting of existing Inbound Fax Numbers

 **Important:** Each Inbound Fax Number ported to your account will be subject to monthly charges and may additionally imply a one-time charge to cover the porting process.

 **Note:** The porting of numbers cannot be guaranteed as it is subject to the policies and capabilities of the current and/or targeted providers depending on the region where the porting is requested. If the porting of a number is not possible, we will propose you an alternate number (DID or toll-free).

- To request the porting of existing **toll-free numbers**:

Contact our Customer Service Team by opening a support request (<https://support.xmedius.com/hc/requests/new>). You will then be guided through the whole process until the numbers are ported to your account.

 **Remember:** The toll-free number usage is typically not included in base plans, and all charges and fax page rates for toll-free numbers are different (usually higher) than the ones for regular numbers (DIDs).

- To request the porting of existing **regular numbers (DIDs)**:

1. In your Web portal, access the **Fax Number Requests** page and click the **Request Number Porting** link.
2. Fill-in the form with all information required, and save it.

The form allows you to specify – among others – the list of numbers to port, their source/ownership and the date on which you want them to be ported.

3. Depending on your region, you may have to provide some documents, including a letter of authorization (LOA) that will be used to legally authorize the porting.
  - a) Download the LOA (pre-filled with the information you entered in the form).
  - b) Have this LOA signed by the person who has the authority to port numbers for your company.
  - c) Upload the signed LOA, as well as any other document explicitly requested.
  - d) Submit the request.

- 👉 **Important:** The LOA download/upload can be performed any time after the request information is saved. However, the request will not be processed until you submit it after uploading the signed LOA and any other requested document.

Once the request is *Submitted*, our team is notified to process it.

- 👉 **Note:** You will be notified by email (as well as any other administrators of your account) each time the status of your request changes. If you need to communicate with our team about the request and follow-up its progress, please use the request's **Comments** page.

#### Thereafter:

- An expected porting date will be first estimated while waiting a confirmation from your current provider.
- After date confirmation, the numbers listed in the request will be added to your cloud service account.
  - 👉 **Important:** At this point, the added numbers will not be activated yet to receive faxes until the *Confirmed Porting Date*. However, you should immediately configure number assignments so that your processes are unaffected by the change of provider.
- Once the request is *Completed*, it means that the added numbers have been completely ported.

## Requesting External Numbers

To request the addition of External Numbers to your enterprise account in order to use them as Outbound Fax Numbers, you need to contact our Customer Service Team by opening a support request (<https://support.xmedius.com/hc/requests/new>).

You will then be guided through the whole process until the numbers are added to your account.

- 👉 **Important:** The affected number must be owned by your company. You will have to provide a proof of ownership (i.e. a telephone bill) to ensure the processing of your request.
- 👉 **Remember:** An External Number cannot be used to receive faxes via your enterprise account, and as such, will not be charged.

## Fax Retention

Your Fax Service includes the storage and retention of your faxes. This article provides all details you should know about this feature and describes the options you have to customize it.

### Default Behavior and Benefits

By default, all faxes sent and received by all users of your enterprise account will be stored and retained on our servers as long as you have your account.

Thus, all faxes remain available without time limitation through the Web Portal of your Fax Service. They benefit from a secured and survivable storage environment and can be accessed only by their respective owners or by audited administrators.

## Charges

Retention for faxes sent/received within the last 90 days is free.

All faxes retained over 90 days are charged monthly at a predefined rate per page (specified by contract).

## Custom Retention Schemes

Depending on your company legal obligations or archiving requirements, you may need to set your fax retention according to a precise scheme.

To do this, simply open a support request (<https://support.xmedius.com/hc/requests/new>) and clearly express your needs. Typical schemes are described below.



**Attention:** Once your request has been processed, all faxes already exceeding the specified retention period will start to be automatically and permanently deleted from our servers. Also note that any change to your fax retention/deletion scheme will apply to all users and administrators of your enterprise account, without exception.

### Fixed Retention Scheme (Over 90 Days)

If you need to archive your faxes for a fixed period (several years, for example), just specify this period in your request.

All faxes retained over 90 days are charged monthly at the expected rate. Then, at the end of the requested retention period, these faxes (i.e. fax records and fax images) will be permanently deleted from our servers.

### 90-Day (or less) Retention Scheme

If you have no specific archiving/legal requirements, you can request for a free 90-day (or less) retention of your faxes.



**Note:** The minimum that you can request is 7 days of retention.

After the requested period of retention at no charge, faxes (i.e. fax records and fax images) will be permanently deleted from our servers.

### Zero Retention Scheme



Depending on your company policies, for example if your company requires to strictly comply with information/data privacy laws, you might want to set your account for immediate fax deletion. You can request for a "Zero Retention" scheme to achieve this.

However, the Zero Retention scheme implies some rules and restrictions you must be aware of:

- The immediate deletion only applies to the fax images (i.e. the fax pages) and depends on the fax notification delivery success:
  - When the fax notification delivery is successful, the fax image is immediately and permanently deleted.
  - When the fax notification delivery is not successful, the fax image is always kept for 7 days (not configurable) so that the delivery can be reattempted. The fax image permanent deletion will only occur after this delay (even after successful reattempt).



**Note:** Fax notification delivery is considered successful only if **all** the expected notifications were successfully sent. In addition for inbound faxes only, at least one notification destination must have been set to deliver the faxes (and even unrouted faxes) out of the system – by email, to a printer, a folder, etc.

-  **Important:** A fax that was received is deemed being in the possession of the recipient and it is your responsibility to ensure that it is appropriately processed. As such, it is essential to ensure that the infrastructure used to receive notifications at your premises is *highly available*.
- All fax records (i.e only the fax metadata without the fax content) are always kept for a minimum of 7 days (or more, if you request it) and will be permanently deleted after this delay.
-  **Note:** Even when Zero Retention is enabled, data temporarily kept on the system to process the fax transaction might be captured by a system backup.


## Configuring your XMediusFAX service for PII regulation compliance

*Guidelines for configuring your faxing environment (including your XMediusFAX Cloud service and your own corporate environment) to help gain compliance with PII regulations such as GDPR.*

### Purpose

If your organization is involved in the processing of Personally Identifiable Information (PII), you may need to configure your faxing environment (including your XMediusFAX Cloud account, local clients and other involved communication/infrastructure systems) to comply with PII regulations such as the European Union's General Data Protection Regulation (GDPR).

The following list of recommendations intends to be a basic set of guidelines to help your XMediusFAX Cloud account administrators and corporate IT administrators to take the appropriate actions in their respective fields in the context of PII regulation compliance process.

-  **Note:** For more details and instructions on XMediusFAX Cloud settings involved in the configurations described in this article, please see the XMediusFAX service online help (**Help ► Fax Administration Help**).

### Contents

1. [Identify your PII data](#) on page 29
2. [Simplify the maintenance of your user accounts](#) on page 30
3. [Isolate your PII users \(if needed\)](#) on page 30
4. [Protect your fax data](#) on page 30
5. [Plan and setup your data retention/deletion](#) on page 31
6. [Keep your systems up to date](#) on page 32

### Identify your PII data

First of all, you should clearly identify the different types of PII data that your organization is processing, as well as the people within your organization who are intended to process this data, and finally, the context in which the PII data is processed.

This analysis should help you take careful decisions and implement the most appropriate corporate rules in order to meet your PII processing requirements while providing a proper faxing environment to all users of your organization.

## Simplify the maintenance of your user accounts

In corporate environments with numerous employees using multiple and separate services, it is sometimes hard to efficiently synchronize the maintenance of user accounts and credentials over all the corresponding platforms (and among them, the XMedius cloud platform).

In a context of PII processing, this topic becomes critical and should be carefully addressed: you need to ensure at all times that the PII data is accessed only by the intended users, according to the security rules you have defined (for example, password policies).

As such, to simplify the maintenance of your Fax user accounts and better control their access, it is recommended (as much as possible) to consider the following:

- Centralize the management of your user accounts by enabling an automated synchronization from your Active Directory using the dedicated AD Sync tool – see: [Synchronizing Users from Active Directory](#) on page 5.
- Centralize the enforcement of your corporate password policy by activating the Single Sign-On functionality in your XMedius cloud enterprise account – see: [Enabling User Single Sign-On \(SSO\) using AD FS](#) on page 14.

## Isolate your PII users (if needed)

As XMediusFAX Cloud offers convenient options such as fax forwarding and fax box delegation, you may need to determine if some of your fax users may be allowed to share with some others the faxes they are processing, and if some of them must not be able to share these faxes.

To isolate your PII users, you may need to enforce the same restrictions for all users of your XMedius Cloud account, by disabling (for example, in the most restrictive scenario) the **Allow Fax Box Delegation** and **Allow Fax Forwarding** options within the **Fax Settings** ► **General Settings**. Alternatively, if your corporate context requires it, you could consider to open multiple XMedius Cloud accounts.

## Protect your fax data

For security reasons, according to PII regulations, the fax data that you process should be protected at all times – at rest and in transit.

## Protect data in transit

PII fax data should be protected during its transmission within your corporate environment and through the Internet, to and from the XMediusFAX Cloud service.

As such, XMedius uses a secure telecommunication infrastructure, the Web applications used by XMediusFAX Cloud are configured to work in HTTPs only, and the XMedius Cloud mail servers are setup to support TLS (if your own mail servers are configured to use it – see below).

On your side, this may additionally imply the following:

- Setup email transport to TLS to protect any email flow involved in your fax processing.
- Use SFTP, FTPS or SCP if you have to setup fax flows using FTP locations as folder destinations (external to the XMediusFAX Cloud service).




## Encrypt data at rest

PII fax files should be encrypted on the server where the fax data is stored during the retention period.

As such, XMedius ensures that the file systems hosting your XMediusFAX Cloud data – including backup locations – are setup to use the highest encryption standards.

On your side, be aware that you should additionally encrypt any storage destination – not managed by the XMediusFAX service – that you may have included in your fax processing flow (for example, remote folder destinations or other systems/applications).

 **Note:** If you have a backup mechanism involving local fax data folders, do not forget to include the backup locations in your encryption process.


## Plan and setup your data retention/deletion

At this step, you should review the data retention/deletion rules you may have established to meet your PII processing requirements. Note that two types of data are subject to data retention/deletion policies: the faxes themselves, but also all related metadata usable for audit purposes.

## Faxes

To have your fax retention/deletion set up according to your corporate requirements, you need to send a configuration request to the XMedius Cloud team. For more information on the subject, see [Fax Retention](#) on page 27.


Again, having multiple enterprise accounts for each type of processed PII data may offer you more flexibility, if the retention rules are different for each of the PII data types that your organization may process.

 **Important:** The retention rules defined according to PII regulations apply to the whole life cycle of your faxes (i.e. not only XMediusFAX Cloud). That said, to properly calculate the retention periods, you must take into account any other system to which the fax data may have been transmitted after being processed by the XMediusFAX Cloud service. For example, this may include mail boxes, folders or any other application.

## Audit data

For audit and troubleshooting purposes, XMedius ensures the tracking of all fax transmission/processing information, administrative configurations/actions and system events:

- **System/administrative audit logs and fax service logs** are retained for 90 days (fixed value according to XMedius policies) and remain available on-demand if you need them for audit purposes on your account according to your own corporate policies.
- **Fax event logs** are part of the fax records (one event log per fax) and as such, are subject to the same retention/deletion policy as the faxes themselves (see the above section). Therefore, you may need to request an overall fax data retention period that is short enough to meet the data deletion requirement, but that is also long enough to allow the fax event logs to be consulted for audit purposes according to your corporate policies.

 **Note:** The minimum retention period that you can request for fax records is 7 days. For more details, see [Fax Retention](#) on page 27

## Keep your systems up to date

In the context of PII processing, the security of systems is a critical topic to monitor carefully.

As such, XMedius constantly maintains up to date the systems hosting the XMedius Cloud platform and services as per its policies, by always applying the latest security fixes and improvements produced by the software industry and by its own development team.

On your side, it is always recommended to additionally maintain all your user workstations up to date:

- By applying **OS security updates** as soon as they are released.
- By maintaining any of your **XMediusFAX client software** up to date – note that you can subscribe to receive email notifications when XMedius Cloud services and client tools are updated (go to <https://support.xmedius.com/hc/en-us/sections/207217288-Change-History> and use the **Follow** option at the top right of the page).

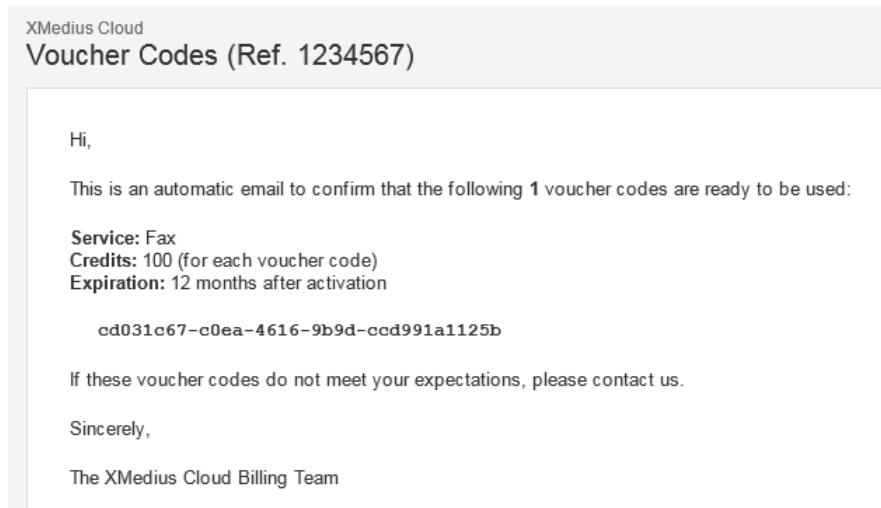
## Adding Fax Credits using a Voucher Code

*How to feed your Enterprise Account with fax credits received in the form of a Voucher Code.*

### Pre-Requisites

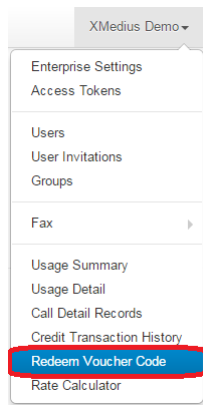
This procedure can only be done if:

- You are an **administrator** of your XMedius Cloud Enterprise Account,
- Your Enterprise Account is set in **Prepaid** mode, and
- You received by email a valid/unused **Voucher Code** generated by XMedius:



### Procedure

1. Log in to the XMedius Cloud portal.
2. Use the menu to access the **Redeem Voucher Code** page:



### 3. On the Redeem Voucher Code page:

## Redeem Voucher Code

If you have been provided a voucher code, you can redeem it to refill your account. Enter the code to validate the voucher content before redeeming it.

cd031c67-c0ea-4616-9b9d-ccd991a1125b

Service	Fax
Credits	100
Expires after	12 months

- Copy/paste** the code you received by email.
- Validate** it to verify the voucher content (service, credits, expiration).
- Redeem** it to feed your account with the credits.

Once the code is redeemed, the **Credit Transaction History** page appears, showing your credit balance:

## Credit History

Monitor your credit transactions and refill your account by redeeming a voucher code. Contact XMedius to obtain vouchers or to request additional credits.

[Redeem a Voucher Code](#)

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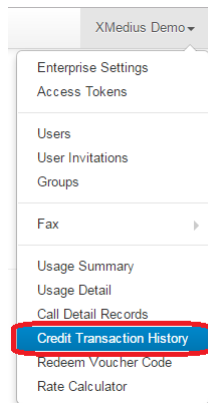
Date	Transaction	Amount	Balance
Today	Fax voucher redeemed   Expiration date: Wed, Oct 18, 2017 9f9e54f2-9cfe-4079-9c88-9cc3924d9452	100.00	300.00
Today	Fax voucher redeemed   Expiration date: Wed, Oct 18, 2017 cd031c67-c0ea-4616-9b9d-ccd991a1125b	100.00	200.00
Today	Fax credits added   Expiration date: Wed, Oct 18, 2017	100.00	100.00

1-3 of 3

You can now start to consume the added credits.

### Note:

- The credits will expire according to the lifetime that was specified in the voucher (if not consumed by that time).
- Multiple voucher codes can be redeemed; all their credits will add up to your balance.
- You can check your credit balance at any time by accessing the **Credit Transaction History** page (shown above) through the menu:




## Porting Out Fax Numbers

At any time, we recognize your right to keep control of your fax numbers and use them through another service provider (whether you decide to continue using the XMediusFAX Cloud service or not).

### Planning


You can port out any fax number from your XMedius Cloud account, whether it was initially ported in from another provider or directly provided by us.

Please advise the XMedius Cloud team once the port out is initiated. Best business efforts will then be applied to ensure that you can benefit from a continuous use of your fax numbers and avoid unexpected fees.

 **Important:** In a context of XMedius Cloud account termination: since porting out numbers can take several weeks, it is recommended that you initiate the port out at least 2 months before your account termination becomes effective. Once your account is terminated, we cannot guarantee that porting out your numbers will be possible (as the numbers could be released).

### Technical Restrictions

Only the owner of a number can initiate a port out and we cannot prevent situations where some of your numbers would be ported out by mistake from your XMedius Cloud account.

 **Attention:** As when you started using the XMediusFAX Cloud service you presumably ported only a subset of all your numbers, you must be **extra careful** before porting the remainder of your numbers to a new carrier. Make sure you **do not include** fax numbers that would have been already ported to your XMedius Cloud account. Otherwise, your XMedius Cloud account's fax numbers will be transferred to the new carrier and your inbound fax traffic will be interrupted until the numbers are ported back, which could take several days.

Once the port out of a number is initiated, it cannot be canceled. The number can be eventually ported back to your XMedius Cloud account, however additional fees will apply.

Also, depending on your country, be aware that the telephone service provider may apply conditions to port out your numbers (e.g require that your numbers are ported out in batches instead of individually).

# Business Environment Integrations

## Fax Integration with Email Infrastructures

Integration to send faxes through email with the Fax Service (XMediusFAX Cloud).


### Allowing Users to Basically Send Faxes through Email

For basic fax service, no configuration is required on your server, nor on the workstations. As long as users can send an email over the internet (e.g. with MS Outlook, Gmail, Office 365...), they will be able to fax via the Fax Service.

For a user to be able to send a fax through email, the following conditions must be observed:

- The user must have an account in your Fax Service.
- The email address used to send emails must be the one configured in the user account.

To send a fax (using any email client), the user only needs to send an email to `fax_number@xmedius.com`.

 **Note:** In the "To" field:

- The `fax_number` should be formatted according to the international format (E.164);
- The `domain` depends on the region of your enterprise account : `xmedius.com` for North America, or `xmedius.eu` for Europe.

Some examples of fax addressing:

- `+15551234567@xmedius.com` (from NA enterprise account to NA destination)
- `+33141234567@xmedius.com` (from NA enterprise account to Europe destination)
- `+33141234567@xmedius.eu` (from Europe enterprise account to Europe destination)
- `+15551234567@xmedius.eu` (from Europe enterprise account to NA destination)

### Configuring Advanced Faxing via Specific Email Clients

Specific features for advanced faxing are also available (upon configuration) for Microsoft Outlook and IBM Lotus Notes.

For configuration, see the corresponding article:

- [Fax integration with Microsoft Exchange/Outlook](#) on page 37
- [Fax integration with IBM Notes and Domino](#) on page 40

### Securing Email Communications

Your Fax Service offers you several means to secure (upon configuration) all email communications related with your account faxing activity.

For more details, see [Securing Email Communications](#) on page 35.

### Securing Email Communications

*All the means to secure email communications related with your Fax service: securing emails with SMTP TLS, setting a mail server white list, enabling email spoofing protection.*

## Securing Emails with SMTP TLS

The mail servers used for your Fax service support TLS for SMTP transmission encryption over the internet. You will find below the information required to configure your email server in order to enable TLS for the communications (in both directions) with our mail servers.

### Supported SMTP TLS Protocols and Ciphers

XMedius follows the industry best practices regarding security and enables only protocols and ciphers that are not known to be vulnerable. As such, TLS 1.0, 1.1 and 1.2 are currently supported and ciphers are selected according to the latest industry standards.

Note that this protocol/cipher support definition is subject to change according to new recommendations.

### Securing Emails Sent by Users for Faxing

For emails sent by users to our mail systems for faxing, our mail systems offer STARTTLS among their capabilities, which may be taken into account by your mail server.

You could therefore enable opportunistic TLS for outbound emails in your mail server and/or even force the use of TLS for emails sent to the service domain, which depends on the region of your enterprise account :

<b>United States</b>	xmedius.com
<b>Europe</b>	xmedius.eu
<b>Canada</b>	xmedius.ca

### Securing Emails Received by Users for Notification

For emails sent by the Fax service for fax notification/routing, our mail systems will switch to TLS if they are offered STARTTLS among your mail server capabilities.

To enable TLS in this direction, you would typically configure your mail server to offer TLS (opportunistic or forced) to SMTP connections coming from the XMedius mail systems.

Here are the XMedius mail system IP addresses (depending on the region of your enterprise account):

<b>United States</b>	66.45.112.68, 66.45.112.70, 66.45.48.108***, 130.250.131.129, 130.250.131.130, 130.250.131.131
<b>Europe</b>	195.68.54.86, 84.14.89.114
<b>Canada</b>	207.35.16.132, 216.208.46.36

\*\*\* Note that this IP address will be deprecated after May 21st, 2018 – for more information, see <https://support.xmedius.com/hc/en-us/articles/360000742527>.


### Setting a Mail Server White List

As an additional security measure, your Fax service lets you enumerate a "White List" of the email relay servers (IP addresses) that will be allowed to submit faxes to your account.

When receiving an email (for faxing) from a user associated with your account, the source IP address can be verified against those entered in the White List.

To configure the White List:

1. Go to your **Enterprise Settings**.
2. In the **Mail Server White List** field, enter the IP addresses of the email servers (comma separated) that will be allowed to submit faxes through your Fax service.

 **Important:** By default, if the White List is left empty, all IP addresses will be accepted.

3. Do not forget to **Update** the settings.


## Enabling Email Spoofing Protection

You can protect your account against the risks of email spoofing, and as such, avoid unauthorized sources to send faxes by email in the name of your enterprise.

More precisely, you have the option to ensure that the sender domain name of emails addressed to your Fax service will be systematically verified using the SPF record of your domain, and consequently accept or reject these emails.

To enable this behavior:

1. Go to your **Enterprise Settings**.
2. Check the option **Spoofing Protection**.

 **Important:** Unlike an email client, your Fax service is not designed to manage the spam level of the emails intended to be processed as faxes.

Therefore, if you enable the **Spoofing Protection** option, you must also take a decision for SPF **SoftFail Management**: either reject or accept emails if SPF record validation results in SoftFail.

3. Do not forget to **Update** the settings.

## Fax integration with Microsoft Exchange/Outlook

*A description on how to perform fax integration with Microsoft Exchange and Microsoft Outlook (with or without fax forms for Outlook).*

### Introduction

Basically, there is no need for a specific configuration to allow Outlook users to send faxes through an Exchange server, as long as the Exchange server is able to send and receive faxes to and from the Internet. Users will be able to use the basic syntax provided in: [Fax Integration with Email Infrastructures](#) on page 35.

However when Outlook is connected to an Exchange server, several options become available depending on your integration needs:

### Fax Contacts

If you require to allow Outlook users to use fax contacts from the Outlook/Exchange contacts:

1. You will need to create in MS Exchange an SMTP send-connector with a "FAX" type address space (see [Creating an SMTP Send-Connector of Type "FAX"](#) on page 38).

- The syntax to be used by users will then slightly change (see [Sending Faxes: Overview](#) on page 17).

## Fax Forms

You can also enable users to benefit from dedicated fax forms in their MS Outlook; this requires:

- Creation of SMTP send-connector with a "FAX" type address space.
- Installation of the forms on the Exchange server (see [Installing the Microsoft Outlook Forms](#) on page 39).

## Creating an SMTP Send-Connector of Type "FAX"

The procedure to follow depends on your Microsoft Exchange version: [With Microsoft Exchange 2000/2003](#) on page 38 or [With Microsoft Exchange 2007 and Above](#) on page 38.

### With Microsoft Exchange 2000/2003

- From the Exchange System Manager, right-click the **Connectors** node and select **New ► SMTP Connector**.
- In the **General** tab:
  - Give the connector a **Name**. For example: `FaxServer`.
  - Select the **Forward all mail through this connector to the following smart hosts** option.
  - Enter the URL supplied to you by your Enterprise provider.
  - Add a bridgehead server by clicking **Add** and making a selection in the available list.
- Create the address space:
  - Select the **Address Space** tab, click **Add**, and then select **Other**.
  - In the Other Address Space Properties dialog, complete the following fields:
    - Type:** `FAX`
    - Cost:** `1`
    - Address:** `*`
  - Click **OK** and close the dialogs.

The new SMTP connector appears in the **Connectors** node of the **Exchange System Manager**.

### With Microsoft Exchange 2007 and Above

- Open the Exchange Management Shell.
- From the command prompt, execute the following command:

```
New-SendConnector -Name FAX -AddressSpace "fax:*;1" -SmartHosts "<Domain>" -DNSRoutingEnabled $false -SourceTransportServers "<HubTransportServers>"
```

Where:

- `<Domain>` must be replaced by the domain corresponding to the region of your enterprise account (i.e. `xmedius.com` for North America or `xmedius.eu` for Europe).
- `<HubTransportServers>` must be replaced with the names of the Hub Transport servers that can use this Send connector.

The SEND connector will appear in the organization's **Hub Transport** list of the **Exchange Management Console**.



 **Note:** For more information about the `New-SendConnector` command, refer to the following Web link: [http://technet.microsoft.com/en-us/library/aa998936\(EXCHG.80\).aspx](http://technet.microsoft.com/en-us/library/aa998936(EXCHG.80).aspx)

## Installing the Microsoft Outlook Forms

There are several XMediusFAX forms available for use in Microsoft Outlook:

- Notification Incoming Success;
- Notification Incoming Failed;
- Notification Outgoing Success;
- Notification Outgoing Failed;
- Composition;
- Preview;
- Notification Broadcast.

The forms can be published as a bundle or individually. Prior to publishing them, please verify the following points:

- Microsoft Exchange (2000 or later) must be already installed;
- You must have previously performed the Microsoft Exchange Integration (see previous sections above);
- Microsoft Outlook (2000 or later):
  - must be already installed (on a different machine than Exchange);
  - must not be set to **Cached Exchange** or **Work Offline** mode.
- Still on Outlook: the account used to publish the forms must have at least the reading and writing rights on the public folders base of Exchange and at least an Editor role on the `Organizational Forms Library` folder, if it already exists.

 **Note:** For the users, the only needed right for using the published forms is a reading right on this folder.

To make the forms available for all Outlook users, you only need to publish them once. To publish the forms:

1. Download the `OutlookForms.zip` file (see <https://support.xmedius.com/hc/en-us/articles/203824776>).
2. Unzip the file.
3. Double-click on the `publishforms.exe` executable.
4. A window appears displaying information about the forms.

Choose among the available options to install the forms you want.

5. In the **Host Name or URL** field of the dialog that is displayed, enter the URL to connect to your Fax Service account (obtained from us after creating your account).


 **Remember:** This URL has the following syntax:

```
https://portal.{domain}/services/{account}/fax
```


where:

- `{domain}` is the domain corresponding to the region of your enterprise account (i.e. `xmedius.com` for North America or `xmedius.eu` for Europe).
- `{account}` is your account short name (visible in the URL to access your cloud faxing service portal).

6. After you have entered the URL, a field appears for entering an **Access Token** (used for authentication to the Fax Service).

 **Note:** The **Access Token** must have the **Send and manage faxes** permission type. To create and retrieve such a token, go to **Access Tokens** from the navigation bar of your cloud faxing service portal.

7. Select the Outlook profile to be used to publish forms.

 **Note:** The selected account should have sufficient privileges assigned.

As each form is published, you may be prompted to enable or disable the macros.

8. Click **Disable** Macros, each time.

The Outlook forms are published as selected.

9. Click on **Exit**.

## Fax integration with IBM Notes and Domino


*The IBM Notes fax composition form provides a means to send faxes (and possibly adjust faxing options) using the IBM Notes mail client.*

### Introduction

Basically, there is no need for a specific configuration to allow IBM Notes users to send faxes through an IBM Domino server, as long as the Domino server is able to send and receive faxes to and from the Internet. Users will be able to use the basic syntax provided in: [Fax Integration with Email Infrastructures](#) on page 35.

However, it is possible to implement a feature that will allow users to send faxes through IBM Notes/Domino using a dedicated fax composition form.

### IBM Notes Form installation


 **Important:** The administrator installing the form must have the proper authorizations to install new databases, access the IBM Notes client Administrator, modify access-control lists and modify configuration documents on the server.

### Installation Planning

Installing the IBM Notes Form requires the administrator to perform several operations on the server hosting the IBM Domino application using both IBM Domino and IBM Notes with an administrative account. Following the installation, all targeted IBM Notes users will be able to use the installed form.

Here are the main installation steps:

1. [Signing the Database](#) on page 41
2. [Installing and configuring the Fax Memo Template](#) on page 41
3. [Synchronizing the Mail Template Databases](#) on page 44
4. [Configuring the IBM Notes Form](#) on page 45


 **Note:** The procedures of this section are applicable to IBM Notes/Domino 8.0 or higher. They are also applicable to earlier versions of IBM Notes/Domino, however some menus and paths may be slightly different. Mainly:

Notes/Domino 8.0 and higher versions	Earlier versions of Notes/Domino
File ► Open ► Lotus Notes Application	File ► Database ► Open
File ► Application ► Properties	File ► Database ► Properties

## Signing the Database

The database must first be signed by an administrator to vouch for its integrity:

1. Put the database files on the IBM Domino server:
  - a) In Microsoft Windows Explorer, browse to the `Lotus\Domino\Data` directory, on the server's hard drive.
  - b) Create a sub-directory called **Fax**.
  - c) Download the `NotesForms.zip` file (see <https://support.xmedius.com/hc/en-us/articles/203824806>).
  - d) Unzip the file.
  - e) Copy the `Fax_Memo_Install.nsf` and `FAXconfiguration.nsf` database files to the **Fax** sub-directory you just created.
 

 **Note:** `.nsf` stands for **Notes Storage Facility**. These files represent typical IBM Notes databases.
2. Find the database files in the Domino Administrator:
  - a) Start the Domino Administrator by clicking **Start > Programs > Lotus Applications > Lotus Domino Administrator**.
  - b) Once logged in, click on the tab for the server (domain), on which the database that you want to sign is located.
  - c) Click on the **Files** tab.
  - d) In the panel at the left, double-click on the **Fax** folder.
3. Sign the database files:
  - a) In the panel at the center of the window, select both databases (Fax Memo Install and Fax Configuration), right-click and select **Sign**.
  - b) Choose either of the following, as per your organization's policy:
    - **Active User's ID** to sign using your ID.
    - **Active Server's ID** to sign using the ID of the server that stores the database or template.
  - c) Click **OK**.
  - d) In the **Create Cross Certificate** dialog that appears, click **Yes**.  
A dialog box may appear, showing the number of databases processed and the number of errors that occurred (if any). See the **Notes Log** for details.

## Installing and configuring the Fax Memo Template

The goal is to modify the organization's mail template as little as possible. The installation database (`Fax_Memo_Install.nsf`) contains all the design elements necessary for installing the fax forms. The (`FAXconfiguration.nsf`) is used to define the various languages. This installation basically does the following:




- copies the current mail template (`MailFaxTemplate.ntf`) into the **Fax** sub-directory. The copy becomes the new template and is used to refresh the mail databases;
- integrates the fax form design elements into the copy of the mail template;
- configures the database.

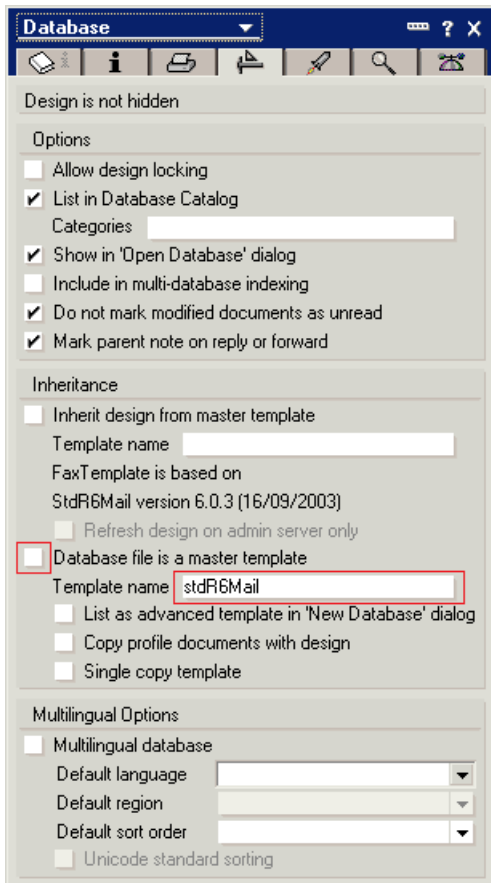
To launch the automatic-install process, follow these steps:

1. Start IBM Notes by clicking **Start > Programs > Lotus Applications > Lotus Notes**.
2. Install the Fax Memo Template:
  - a) Select the tab for an empty workspace and click **File > Open > Lotus Notes Application**.

- b) In the **Open Database** dialog, select the server where the `Fax_Memo_Install.nsf` and `FAXconfiguration.nsf` database files are located, in the **Server** box.
- c) Double-click on the **Fax** folder and then double-click on **Fax Memo Install**.
- d) Click **Open**. The **Installation Form** tab is created in the IBM Notes workspace.
- e) Fill in the fields as follows:

Field	Description	Default Value
<b>Installation Path</b>	The location on the server where IBM Domino is installed.	<code>&lt;DominoInstallPath&gt;\Data</code>
<b>Mail Template Path</b>	The path where the organization mail template is located.	<code>&lt;DominoInstallPath&gt;\Data</code>
<b>Mail Template Name</b>	The name of the organization's current mail template file.	<code>mail&lt;DominoVersion&gt;.ntf</code>
<b>Server Name</b>	The identification of the server where IBM Domino is installed.	<code>CN=&lt;DominoHostName&gt;/O=&lt;CompanyDomain&gt;</code>

- f) Click the **Begin Installation** button, a progress bar will appear.
  - g) Once the installation procedure is complete, click **Exit Installation**.
3. Click **No** when you are prompted to open the configuration database to set up your specific language needs (this will be done at a later time).
    -  **Note:** From here, if you wish to apply the forms to all users of your company, you can continue the current procedure as it is given. Otherwise, it is possible to apply these forms only to some users; in that case, you can adapt the rest of the procedure by changing the settings only for these users.
4. Access the IBM Notes server database:
    - a) Click **File > Open > Lotus Notes Application**.
    - b) In the **Open Database** dialog, select the **Lotus Notes** server, in the **Server** box.
  5. Access the organization's inbox tab:
    - a) In the **Filename** field at the bottom, type the name of the organization's current mail template file (`mailX.ntf`, where `mailX` is the Domino/Notes version, i.e. `mail8.ntf` for version 8 or `mail85.ntf` for version 8.5).
      -  **Note:** `.ntf` stands for Notes Template Facility. Such a file represents an IBM Notes template, a skeleton that contains database design elements, but no documents.
    - b) Click **Open**. A new tab appears showing the organization's **Inbox**.
  6. Change the organization's inbox properties:
    - a) Click **File > Application > Properties**.
    - b) In the dialog, click on the fourth tab ().



c) Copy the value in the **Template name** field.

 **Remember:** You need to keep this **Template name** value copied for a further step of this procedure (Mail-Fax template properties adjustment).

d) Uncheck the **Database file is a master template** box.

e) Close the dialog.

7. Access the IBM Notes server database again:

a) Click **File** ► **Open** ► **Lotus Notes Application**.

b) In the **Open Database** dialog, select the **Lotus Notes** server, in the **Server** box.


8. Access the Mail-Fax template tab:

a) Double-click on the **Fax** folder.

b) In the **Filename** field at the bottom, type `Fax\MailFaxTemplate.ntf`.


c) Click **Open**.

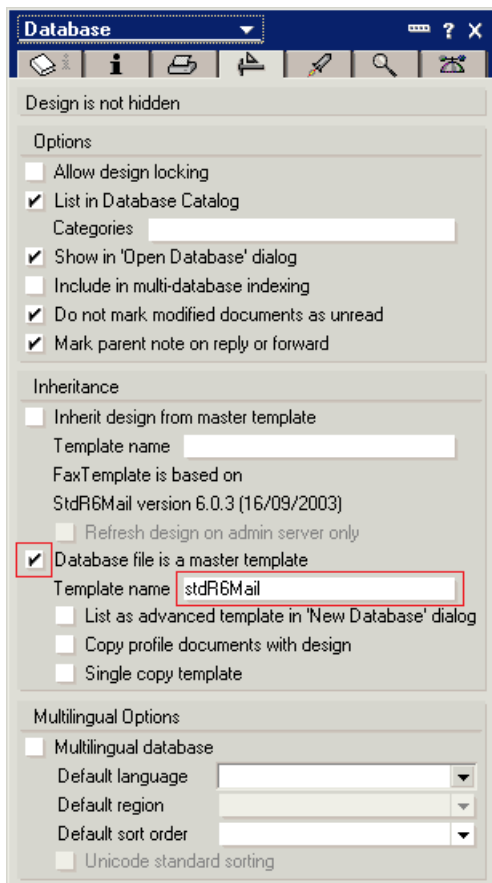
The **Mail-Fax Template-Fax** tab opens and a **Fax** option is now visible in the **Views** folder in the left pane. A **Mail-Fax Template** icon is also created in the workspace.

 **Note:** Views display specific documents with similar criteria in a database.

9. Adjust the Mail-Fax template properties:

a) Click **File** ► **Application** ► **Properties**.

b) In the dialog, click on the fourth tab ().



- c) Check the **Database file is a master template** box.
- d) In the **Template name** field, paste the **Template name** value previously copied from the organization's inbox properties.
- e) Close the dialog.

## Synchronizing the Mail Template Databases

The Designer server task synchronizes all server and user databases that are linked to a template. For the update to work, a template must reside on the same server as the databases linked to it. Replicas synchronize with the templates stored on their servers.

By default, the Designer server task runs at 1:00 a.m. However, an administrator can synchronize the mail template database manually.

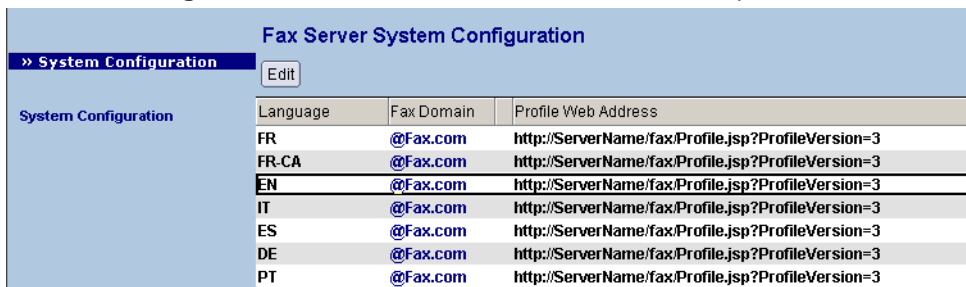
To do so:

1. Start the Domino Administrator by clicking **Start ► Programs ► Lotus Applications ► Lotus Domino Administrator**.
2. Once logged in, click on the tab for the server (domain), on which the database that you want to synchronize is located.
3. Click on the **Server**, and then the **Status** tabs.
4. Click **Server Console** in the panel at the left.
5. Type `load design -d mail` in the **Domino Command** box at the bottom of the console, and then press **Enter**.

## Configuring the IBM Notes Form

1. Start IBM Notes by clicking **Start > Programs > Lotus Applications > Lotus Notes**.
2. Create and open the Fax Configuration tab:
  - a) Select the tab for an empty workspace and click **File > Open > Lotus Notes Application**.
  - b) In the **Open Database** dialog that appears, select the server where the `FAXconfiguration.nsf` database file is located, in the **Server** box.
  - c) Double-click on the **Fax** folder and then double-click on **Fax Configuration**.
  - d) Click **Open**.

The **Fax Configuration** tab is created in the IBM Notes workspace.



Language	Fax Domain	Profile Web Address
FR	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
FR-CA	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
EN	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
IT	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
ES	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
DE	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3
PT	@Fax.com	http://ServerName/fax/Profile.jsp?ProfileVersion=3

3. Adjust the Form settings for connection to the Fax Service:
  - a) Select the language for which you want to make the modification.
  - b) In the **Fax Domain** column, change the value to the domain corresponding to the region of your enterprise account (i.e. `@xmedius.com` for North America or `@xmedius.eu` for Europe).

This is the domain of the Fax Service, to which the email (i.e. the fax form) will be sent in order to be processed as a fax.

- c) Double-click the value in the **Profile Web Address** column and edit the address.

This address can only be entered in the form of an URL and must contain an **Access Token** (used for authentication to the Fax Service).

Acceptable syntax:


```
https://portal.{domain}/services/{account}/fax/profile?Permalink={account}&ProfileVersion=3&AccessToken={access_token}
```

 **Note:** The syntax provided here contains 4 placeholders:

- `{domain}` is the domain corresponding to the region of your enterprise account (i.e. `xmedius.com` for North America or `xmedius.eu` for Europe).
- `{account}` (to enter twice) is your Enterprise Account (visible in the URL to access your Web Portal).
- `{access_token}`: the **Access Token** to enter must have the **Send and manage faxes** permission type. To create and retrieve such a token, go to **Access Tokens** from the navigation bar of your Web Portal.

For example, with Enterprise Account **example** located in North America and with the token **a275fa55604f87ee70e263c6562135f6**, the URL would be:

```
https://portal.xmedius.com/services/example/fax/profile?Permalink=example&ProfileVersion=3&AccessToken=a275fa55604f87ee70e263c6562135f6
```

 **Note:** The form will add `&SmtAddress=<user_SMTTP>` at the end of the URL.


- d) Repeat all these steps for all the languages being used.

4. Click **Save & Close**.

## 5. Close the IBM Notes Application

## Fax Integration with Windows Clients

Where to obtain and how to install and configure these additional faxing tools on a workstation.

-  **Note:** This topic is specifically intended for administrators. If you are an end-user, see [Faxing using Windows Applications/Tools](#) on page 18 instead.

### Introduction

Several Windows client applications and tools can be installed on a user workstation from a downloadable client installer.

- Main of them offer advanced faxing means: see [Windows Applications/Tools for Faxing](#) on page 46.
- Others are convenience tools used to improve faxing experience: see [Convenience Tools for Windows](#) on page 47.


All these client applications and tools (and their documentation) are available in: English, French, German, Spanish, Italian, Portuguese, Russian and Chinese.

Other tools and faxing means are also available but require additional configuration to be performed by an administrator. See [Other Tools and Faxing Means](#) on page 47.

### Downloading/Installing the Client Applications

The Client Installer can be downloaded from the XMedius Cloud Help Center, section **Technical Support ► Software and Tools**.

See <https://support.xmedius.com/hc/en-us/articles/203824826> for all download/installation instructions.

-  **Note:** The installation procedure generates a log file (XMInstallLog.log) which can be found in the following location: `<hard_disk>\Program Files (x86)\XMediusFAX\Trace`. Each subsequent installation of client modules appends to this file.

### Windows Applications/Tools for Faxing

#### SendFAX

SendFAX is used to compose and send faxes. SendFAX also provides a means of viewing, annotating and reordering the pages of the documents to be faxed. A local phone book for SendFAX is available in option.

Also installed with SendFAX is the XMediusFAX printer. Using that printer from a desktop application locally converts the current document into a TIFF file in order to open it in SendFAX and fax it. Accessed this way, SendFAX may either be displayed with its full interface or with a minimal interface for quick faxing.

#### Web Fax Composer Printer

Using that printer from a desktop application locally converts the current document into a TIFF file in order to fax it via the Web Client. The Web Client Compose feature is then launched with the TIFF file included (uploaded) as an attachment.



## Print To Mail

Using that printer from a desktop application locally converts the current document into a TIFF file in order to fax it via email. Thus, an email creation window opens with the TIFF file included as an attachment.

## Convenience Tools for Windows

### Microsoft Outlook Add-in

The Microsoft Outlook Add-in is a shortcut button added in the MS Outlook toolbar that simply launches the preferred fax composition interface locally implemented in the user PC (without attachment). This interface can be (by decreasing priority):

1. The SendFax application (if SendFax was installed on your computer)
2. The XMediusFAX composition form for Outlook (if the forms were published by the administrator and SendFax was not installed)
3. The usual email creation window of Outlook (if none of the two previous tools were installed)

### Cover Sheet Editor

The Cover Sheet Editor allows users and administrators to create and modify fax cover sheet templates.

- Administrators can upload cover sheets to the from the fax administration interface in order to be used in Profiles. The default cover sheets can be downloaded for modification.
- Users can use their own cover sheets in the various faxing interfaces provided, only if they have been allowed to by the administrator.

### Tiff Viewer

This application can be used to preview Tiff files before sending them as fax attachments.

## Other Tools and Faxing Means

Other faxing means are also available in addition to the ones described above. Some are distributed separately from the downloadable client installer, and all of them require additional configurations. For more information, see the related articles:


- [Fax Integration with Email Infrastructures](#) on page 35
- [Installing the Fax Merge Macros \(MS Word and OpenOffice.org\)](#) on page 47
- [Configuring the Microsoft Office Internet Fax Service](#) on page 49


## Installing the Fax Merge Macros (MS Word and OpenOffice.org)

*Where to obtain and how to install these additional faxing tools on a workstation.*

### Introduction

All the tools needed for installing the fax merge macros are available on the user's computer once a Windows client application is installed (see [Fax Integration with Windows Clients](#) on page 46). By default, these tools can be found at the following path: C:\Program Files\XMediusFAX\Client\MailMerge.

 **Note:** The installation depends on the text application used (MS Word or OpenOffice.org), and on its version. Therefore, several installation procedures are described here.

-  **Important:** To ensure that the fax merge macros function properly, when you install MS Office, make sure the Visual Basic for Applications (VBA) component is installed along with it.

## Installation Procedure for Microsoft Word 2003 or Earlier Versions

1. Open Microsoft Word.
2. In the menu bar, select **Tools** ► **Options**, then select the **Security** tab.
3. Click **Macro Security**.
4. If the selected option is **Very High** or **High**, select the **Medium** option and click **OK**.
5. Click **OK**.
6. Open the document `xmmerge.doc` located in the `<install_path>\Client\MailMerge\en` folder.
7. Click **Enable Macros**.

The document opens with a single button: **Install the fax server macros**.

8. Click on the button to launch the installation.

After the installation, the new toolbar with two buttons appears at the top right of the Microsoft Word window.

If the macro security was changed to allow this installation, it should be set again to its original level, as shown at the first steps of the procedure.

## Installation Procedure for Microsoft Word 2007 / 2010

1. Go to the `<install_path>\Client\MailMerge` folder.
2. Run the `WordRibbonSetup.exe` file.

A dialog with three buttons (**Install the MS Word Fax Add-In**, **Uninstall the MS Word Fax Add-In** and **Exit**) is displayed.

3. Click **Install the MS Word Fax Add-In**.
4. After the installation, start Microsoft Word.

A new tab **Fax** should appear in the ribbon, and under this tab, two functions: **Send Fax** and **Fax Merge**.

To use these functions, please refer to the *XMediusFAX User Guide*.


## Installation Procedure for OpenOffice.org

1. Open OpenOffice.org Writer.
2. In the menu bar, select **Tools** ► **Options**, then select the **OpenOffice.org** ► **Security** node.
3. Click **Macro Security**.
4. If the selected option is **Very High** or **High**, select the **Medium** option and click **OK**.
5. Click **OK**.
6. Open the `faxmacros.sxw` document located in the `<install_path>/Client/MailMerge` folder.
7. Click **Enable Macros**.

The document opens with two buttons: **Install fax macros** and **Uninstall**.

8. Click on the **Install fax macros** button to launch the installation.

After confirmation, the macros are installed.

 **Note:** A message box indicates that you must close and restart OpenOffice.org and the quick launch bar (icon at the bottom-right of the screen) in order for the installation to be effective.

## 9. Restart OpenOffice.org Writer.

The **Fax** menu, containing the **FaxBroadcast** and **SendFax** submenus appears now between the **Tools** and **Window** menus.

If the macro security was changed to allow this installation, it should be set again to its original level, as shown at the first steps of the procedure.

## Configuring the Microsoft Office Internet Fax Service


*Where to obtain and how to install these additional faxing tools on a workstation.*


### Introduction

MS Office programs include a built-in Internet Fax Service functionality allowing users to connect directly to a fax service provider that will send the fax for them.

XMediusFAX users can send faxes through XMediusFAX by selecting this feature, as long as all of the following points are true on the users computers:

- Microsoft Office is installed.
- The Office installation includes necessarily Microsoft Outlook, which has been configured to send emails.
- The following Microsoft feature is installed, depending on the version of MS Office:
  - For MS Office 2007: Microsoft Office Document Imaging (MODI, installed by default and available from the MS Office installation program, under “Office Tools”).
  - For MS Office 2010: the Microsoft Windows fax printer driver (installed by default on Windows Vista and Windows 7, also available on Windows 2008 through the Fax Server role).

 **Note:** If you have any issues finding or installing MODI or the Windows fax printer driver, please refer to the Microsoft support.

 **Note:** It could happen that the feature does not work because of 64-bit incompatibility, for example if MS Office 2007 would be installed on Windows 2008 64-bit.

- Some specific configuration (described here) has been performed by an administrator.

All the tools needed to configure Microsoft Office for using the Internet Fax Service with XMediusFAX are available in the `OfficeFax.zip` file (see [Download page](#)).

The configuration can be done:


- On single computers (one by one): [Installation on a Single Computer](#) on page 49, or
- By massive deployment (all computers at the same time): [Installation by Group Policy](#) on page 50

### Installation on a Single Computer

To install the Internet Office Fax Service configuration for XMediusFAX:

1. Download the `OfficeFax.zip` file (see <https://support.xmedius.com/hc/en-us/articles/203824816>).

2. Unzip the file.
3. Make a local copy of the `OfficeFaxInstall.reg` file.
4. Edit this file using a text editor:
  - a) Identify the block of registry keys corresponding to the version of Microsoft Office running on this computer (2007 or 2010).
  - b) In the identified block, replace the `[SMTP Domain]` placeholder with the appropriate string (domain name, FQDN, etc...) that your mail server will resolve to the IP address of your fax server.  
For example: `fax.example.com`

 **Note:** Take care to not remove any other string or character than the `[SMTP Domain]` placeholder.


  - c) Save and close the file.
5. Execute the modified `OfficeFaxInstall.reg` file.


This computer is now configured to use the Microsoft Office Internet Fax Service feature with XMediusFAX through the specified SMTP domain.

## Installation by Group Policy

To be able to massively deploy the Internet Office Fax Service configuration for XMediusFAX, you need to perform the following steps including a configuration of your Active Directory:

1. From any computer, logon with an account having administrative permissions on your Active Directory.
2. Download the `OfficeFax.zip` file (see <https://support.xmedius.com/hc/en-us/articles/203824816>).
3. Unzip the file.
4. Make a local copy of the `OfficeFaxInstall.reg` file.
5. Edit this file using a text editor:
  - a) In all 3 blocks of registry keys (each block corresponding to a different version of Office: 2007 or 2010), replace the `[SMTP Domain]` placeholder with the appropriate string (domain name, FQDN, etc...) that your mail server will resolve to the IP address of your fax server.  
For example: `fax.example.com`

 **Note:** Take care to not remove any other string or character than the `[SMTP Domain]` placeholder.

  - b) Save and close the file.
6. Configure your Active Directory as follows:
  - a) Open the **Active Directory Users and Computers**.
  - b) Select the target domain for the deployment (the domain corresponding to the targeted users).
  - c) Under this domain, select an existing **Organizational Unit** containing targeted users and display its **Properties**.  
 **Note:** All the members of this unit will be subject to the deployment.
  - d) Under the **Group Policy** tab, create a new **Group Policy Object** and edit it.
  - e) Select **User Configuration > Windows Settings > Scripts Logon/Logoff**.
  - f) Display the **Properties** of the **Logon** item.
  - g) Add the following files to the **Logon** folder (using the **Show Files** button):
    - `OfficeFaxInstall.reg` (the local one you modified with the correct SMTP domain)
    - `OfficeFaxRegistryInstall.cmd` (directly from the location where it was extracted)

- h) **Add** a new script and **Browse** for selecting the `OfficeFaxRegistryInstall.cmd` file you just added to the **Logon** folder.
- i) Validate and go back to the **Active Directory Users and Computers** main interface.
- j) Repeat all these steps for any Organizational Unit that is concerned by the deployment described here.

From now, every user registered within the Organizational Units you just edited above will get their Internet Office Fax Service feature silently configured on next logon. All these users will be able to use the feature with XMediusFAX through the specified SMTP domain.

## Integration for Faxing via MFPs

### Introduction

Multi-Function Printers/Devices (MFP/MFD) are fax/scanner/printer/copier machines that can be integrated into your local area network thanks to their built-in LAN access. They can be integrated with your Fax Service in two main ways:

- Faxing by e-mail: [Scan to Email/T.37](#) on page 51
- Faxing using a specific interface provided by dedicated connectors: [MFP Apps/Connectors](#) on page 52


### Scan to Email/T.37

Any MFP that has the ability to send through the Internet an email with a scanned document as attachment can fax through your Fax Service.

#### The To Field

When composing the email from the device, the user will only need to enter in the **To** field the following instead of a regular email address: `fax_number@domain`, where:

- `fax_number` should be formatted according to the international format (E.164);
- `domain` depends on the region of your enterprise account : `xmedius.com` for North America, or `xmedius.eu` for Europe.


 **Note:** Some MFPs are T.37 compliant and allow the administrator to pre-configure the domain of the Fax Service. Users will then simply need to enter a fax number as destination.

Some examples of fax addressing:

- `+15551234567@xmedius.com` (from NA enterprise account to NA destination)
- `+33141234567@xmedius.com` (from NA enterprise account to Europe destination)
- `+33141234567@xmedius.eu` (from Europe enterprise account to Europe destination)
- `+15551234567@xmedius.eu` (from Europe enterprise account to NA destination)

#### The From Field

To ensure that the email will be eventually sent as a fax, the sender (**From** field of the email) must be a User of your Enterprise Account.

 **Important:** You must ensure that the **From** field will always be filled (either manually, or automatically by MFP login) with the appropriate email address – corresponding the user who is actually sending the email.


## MFP Apps/Connectors

Several apps/connectors are also available to further facilitate faxing with MFPs: they provide a dedicated user interface that enables faxing using functionalities inherited from the Fax Service (selecting a cover sheet, adding recipient info, selecting and saving phone book contacts, changing sender/fax/scan options...).

Here is the list of all MFP apps and connectors currently available from our Sales Team:

App/Connector	Description
<b>XMediusFAX App for Xerox ConnectKey enabled MFPs</b>	For MFPs that support the Xerox® ConnectKey® technology. <ul style="list-style-type: none"> <li>Get the App and download its documentation: <a href="https://support.xmedius.com/hc/articles/204207056">https://support.xmedius.com/hc/articles/204207056</a>.</li> </ul>
<b>XMediusFAX Connector for Sharp OSA-enabled MFPs</b>	For MFPs that support the Sharp Open Systems Architecture (OSA)*.
<b>XMediusFAX eCopy ShareScan Connector</b>	For MFPs compatible with the eCopy ShareScan technology*.
<b>XMediusFAX Fuji Xerox Apeos Connector</b>	For MFPs compatible with Fuji Xerox Apeos iiX*.
<b>XMediusFAX Lexmark eSF Connector</b>	For MFPs that support the Lexmark Embedded Solutions Framework (eSF)*.
<b>XMediusFAX Ricoh ESA Connector</b>	For MFPs that support the Ricoh Embedded Software Architecture (ESA)*.
<b>XMediusFAX Xerox EIP Connector</b>	For MFPs that support the Xerox Extensible Interface Platform (EIP)*.

\* These connectors come with their own documentation explaining how to install, configure and use them. To get them, please contact us at [sales@xmedius.com](mailto:sales@xmedius.com).

 **Note:** For further information, visit our website: [www.xmedius.com](http://www.xmedius.com)

## Fax/Notification Printing Integration (Using Remote Printer Destinations)

This article provides instructions to configure Printer Destinations in order to enable the printing of faxes/notifications to remote printers:

- by email (through HP ePrint or using any other SMTP capable printer), or
- using Google Cloud Print.

### Printing Faxes/Notifications through Email

*Procedure to create and configure a Printer Destination in your fax service settings in order to print faxes/notifications by email (using HP ePrint compliant printers or any other SMTP capable printers).*

 **Note:** Pre-requisites depend on your printer model:

- For HP ePrint compliant printer:
  - The printer must be connected to the internet;
  - You must obtain an ePrint email address from HP.
- For other SMTP capable printer:
  - You must have an SMTP server;

- The printer must be able to receive emails from the domain corresponding to the region of your enterprise account (i.e. `xmedius.com` for North America or `xmedius.eu` for Europe);
- You must assign an SMTP address to the printer.

1. Access the **Fax > Settings** interface.
2. In **Notification Destinations > Printers**, click **Add** and give the destination a name.
3. Choose a **Printing Method** according to your printer model: **SMTP** or **HP ePrint**.
4. Enter the email address of your printer as **Destination Address**.
5. Click **OK** to complete the Printer Destination creation.


 **Important:**

In order to finalize the configuration and allow your faxes to be printed, you still need to configure your fax routing mechanism to use the above created Printer Destination. This can be through the Incoming Routing Table (to route incoming faxes) or through a faxing Profile (to use it as additional notification destination).

For more information, please consult the fax settings dedicated help (**Help > Fax Administration Help**).

## Printing Faxes/Notifications using Google Cloud Print


*Procedure to create and configure a Printer Destination in your fax service settings in order to print faxes/notifications using Google Cloud Print.*

 **Attention:** Using the Google Cloud Print service in your fax routing flow allows Google access to the data contained in your faxes. Under such a configuration, encrypted fax delivery is not guaranteed end-to-end by XMedius. Please refer to Google's terms of service.

 **Note:** This functionality requires the following:

- A Google account must be set up (with registered printers).
- The printer must be Google Cloud Print ready, or **otherwise**:
  - a connector (provided by Google) must be installed on a Windows server of the network where the printer is located (just follow the Google instructions at: <https://support.google.com/a/answer/3179170> – *Set up Google Cloud Print on a Windows print server*), and
  - it is required to install Google Chrome multi-user version (see <https://support.google.com/chrome/answer/118663>).

1. Access the **Fax > Settings** interface.
2. In **Notification Destinations > Printers**, click **Add** and give the destination a name.
3. Choose **Google Cloud Print** as **Printing Method**.
4. Acquire an **OAuth Token**:

 **Important:** Ensure to be connected to the Google account through which the remote printer will be used.

a) Click **Acquire Token**.

You will be asked to give your fax service the permission to access your Google account.

b) Click **Allow Access**.

5. Back to your Printer Destination configuration, select a printer among the ones available in the Google account.
6. Click **OK** to complete the Printer Destination creation.

**👉 Important:**

In order to finalize the configuration and allow your faxes to be printed, you still need to configure your fax routing mechanism to use the above created Printer Destination. This can be through the Incoming Routing Table (to route incoming faxes) or through a faxing Profile (to use it as additional notification destination).

For more information, please consult the fax settings dedicated help (**Help ► Fax Administration Help**).

## Fax Integration: Using 3rd Party Applications to Send Faxes

There are several methods to send a fax to the XMediusFAX Cloud service through a 3rd party application.

### Faxing through email

Any XMediusFAX Cloud User can send an email to the cloud-based fax service from where it will be faxed. As such, an application that is capable of sending emails can do so on behalf of a User. See [Fax Integration with Email Infrastructures](#) on page 35.

### Faxing with the XMediusFAX Web Services

Web Services is a programmatic interface to XMediusFAX Cloud. It can be used to send faxes from 3rd party applications with a SOAP request over HTTPs. Such a request could be invoked through the most popular programming languages (Python, Ruby, C++, Java, .NET, ...) or even using command line applications such as cURL.

### Faxing with XML metadata

It is possible to automate faxing using XML metadata. By making an HTTPs POST, you can send an XML metadata file containing the necessary information to send faxes, with optional attachments.

To fax using XML metadata, see the following article: [Sending Faxes using XML Control Files](#) on page 54.

## Sending Faxes using XML Control Files

XMediusFAX Cloud exposes a web application to which applications can send fax control files over HTTPs to your Fax Service.

- First, your faxing application will need to generate an XML control file containing the fax metadata. See [Generating an XML Control File](#) on page 55.
- Then, it will need an authorization token to submit the fax to the Fax Service. See [Creating an Authorization Token](#) on page 55.
- Finally, it will need to POST the XML file over HTTPs. See [POSTing a fax](#) on page 55.

👉 **Tip:** See [Using cURL as a tool to construct and POST the HTTP request](#) on page 56 for an example on how **cURL** can be used to send faxes to the XMediusFAX Cloud web application.



## Generating an XML Control File

The XML control file will include all the necessary information to send a fax (with possible attachments). Your application must be able to generate this XML file for each fax and it must follow a specific syntax. You can use the following link to download a sample XML file and the DTD file (document type definition) to help you build the XML control file (From this article in Knowledge Base: <https://support.xmedius.com/hc/en-us/articles/203824666>).

For a description of the XML tags, refer to the *Faxing with XML* chapter in the online *Administration Guide* (**Help ► Fax Administration Help**).

## Creating an Authorization Token

To submit the fax, an authorization token is required, which will be passed in an HTTP header called XM-Token-Authorization. This token must be created through your Fax Service administration interface.

For example:

```
XM-Token-Authorization: 7d887f894a0597f79a36de461abda2d1
```

where 7d887f894a0597f79a36de461abda2d1 is the token.

To create the token:

1. Select **Access Tokens** from your administration interface navigation bar.
2. Click **Add New Access Token**.
3. Add a display name and select the **Send and manage faxes** permission type.
4. Click **Add**.  
The system will generate an authorization token.

## POSTing a fax


There are two steps your application must make to send a fax:

1. The application must first determine where to POST the data. To do so:
  - a) Submit an HTTPs GET to:
 

```
https://portal.<domain>/services/<account_name>/fax/restservice/url
```

 where:
    - *<domain>* is the domain corresponding to the region of your enterprise account (i.e. `xmedius.com` for North America or `xmedius.eu` for Europe).
    - *<account\_name>* is the login name of your Fax Service account. The response to this request will be a 200 OK with a body that contains only the URL to the *restservice* API of your associated fax server.
  - b) Take this new URL and append `sendfax` to it. This is where you will need to POST your document.
2. The application must then submit an HTTPs POST to the new URL obtained above. This POST:
  - Must include an `XM-Token-Authorization` header (see [Creating an Authorization Token](#) on page 55).
  - Must have a `multipart/form-data` Content-Type.
  - Must have a first part with a header: `name="metadata"`. The body within this part will be the XML metadata.
  - Must have an additional part for each attachment specified in the XML metadata
    - Each of these parts must have a header: `name="attachments"`.

- Each part must also have a filename attribute that contains the name and file extension of the attachment file (e.g. filename="sample.txt").

 **Note:** The application can request the body of the response to be in JSON or in XML format by using the **accept** header:

- accept: application/json, or
- accept: application/xml

If not specified, the result will be in JSON format.

After the POST is made, you will receive a reply from XMediusFAX Cloud describing the status of your request.

## POST reply

Upon successful enqueueing of the fax for delivery, the response to the POST will be 200 OK, with a body detailing the broadcast ID (one per submission) and the transaction IDs (one per recipient) of the fax transaction.

In JSON, the body of the response will look like this:

```
{ "success": "true", "successInfo": { "broadcastId": "[Fax broadcast ID]", "transactionIds": { "transactionId": ["[Fax transaction ID for first recipient]", "[Fax transaction ID for second recipient]", "..."] } } }
```

In XML, the body of the response will look like this:

```
<response>
  <success>true</success>
  <successInfo>
    <broadcastId>[Fax broadcast ID]</broadcastId>
    <transactionIds>
      <transactionId>[Fax transaction ID for first recipient]</transactionId>
      <transactionId>[Fax transaction ID for second recipient]</transactionId>
      <transactionId>[...]</transactionId>
    </transactionIds>
  </successInfo>
</response>
```

Upon failure, the application will receive a 4XX/5XX error. For errors that are related to authentication and processing of the XML metadata, the body of the response will include an error message with more details about what went wrong.

In JSON, the body of the response will look like this:

```
{ "success": "false", "errorInfo": { "errorMsg": "[Description of error]", "errorCode": "[Label of error]" } }
```

In XML, the body of the response will look like this:

```
<response>
  <success>false</success>
  <errorInfo>
    <errorMsg>[Description of error]</errorMsg>
    <errorCode>[Label of error]</errorCode>
  </errorInfo>
</response>
```

## Using cURL as a tool to construct and POST the HTTP request


If you don't want to develop the portion of the application that would construct the HTTP message and submit the request, there exists some tools that could be launched from the command line to perform these tasks.

One of these handy tools is called *cURL*. *cURL* is a command line tool for transferring data using various protocols. It is freely available on the internet (see <http://curl.haxx.se/download.htm>).

## Command Line

You can use the following command line in the folder where *cURL* resides to build a multipart/form-data body in the format described in the previous section.

```
curl -k -F metadata=@<xml_file> -F attachments=@<attachment> -H "XM-Token-Authorization:
<authorization_token>" <POST_URL>
```


 **Note:** You can repeat `-F attachments=@<attachment2>` to include all referenced files.

For example, if:

- `<xml_file>` is: `MyFaxFile.xml`
- `<attachment>` is: `MyAttachment.docx`
- `<authorization_token>` is: `7d887f894a0597f79a36de461abda2d1`
- `<POST_URL>` is: `https://faxus1.xmedius.com/restservice/sendfax`

The command line would look like this:

```
curl -k -F metadata=@MyFaxFile.xml -F attachments=@MyAttachment.docx -H "XM-Token-Authorization:
7d887f894a0597f79a36de461abda2d1" https://faxus1.xmedius.com/restservice/sendfax
```

 **Note:** This URL is an example. You must use the URL returned by the GET request to make your POST.

## Batch File

The following batch file provides an example of how *cURL* could be used:

1. to obtain the URL where the XML metadata will be sent;
2. to submit the fax.

```
set DOMAIN=<your fax service regional domain>
set ACCOUNT=<your fax service account login name>
set TOKEN=<access token>
set XML_FILE=<path to xml file>
set ATTACHMENT_FILE=<path to attachment file>
```

```
set SERVICE_URL=https://portal.%DOMAIN%/services/%ACCOUNT%/fax/restservice/url
```

```
for /F %%x in ('curl -s -k %SERVICE_URL%') do set POST_URL=%%x/sendfax
```

```
curl -v -k -F metadata=@%XML_FILE% -F attachments=@%ATTACHMENT_FILE% -H "XM-Token-Authorization:
%TOKEN%" %POST_URL%
```

## Receiving faxes with 3rd party applications/devices

### Introduction

Incoming faxes are normally sent to a User's Inbound History folder and, by default, to their email inbox with the fax as an attachment. XMediusFAX Cloud offers several additional methods of delivering faxes to your premises that could respond to different integration needs.

### Common Needs

XMediusFAX Cloud can deliver faxes to several destination types including external email addresses, remote file systems and printers. To enable such an automatic fax delivery, you need to have configured:

1. A **Notification Destination**, that will represent the mean to reach the targeted application/device (see [Creating a Notification Destination](#) on page 58).
2. A **Routing Rule**, that will direct the fax to the proper notification destination according to specific criteria (see [Routing a Fax to a Destination using the Incoming Routing Table](#) on page 58).

### Advanced Needs


XMediusFAX Cloud also offers a feature-rich Web Service (SOAP) interface so that a remote application can programatically poll the fax folders of specific users (see [Polling faxes using the XMediusFAX Web Services](#) on page 59).

Finally, the XMediusFAX Cloud Professional Services team can be contacted if you have specific integration needs that are not covered by the above methods (see [Enabling Custom Fax Delivery Scenarios](#) on page 59).


## Creating a Notification Destination

To create a notification destination, go to **Fax Settings** from your Web Portal navigation bar and select **Notification Destinations**. Depending on the preferred mean supported by your targeted application/device:

- For email delivery (to email addresses that are not necessarily associated to users), you need to add a **Mail** notification destination.
- For delivery to a remote file system (e.g. FTP server), you need to add a **Folder** notification destination.
- For delivery to a printer, you need to add a **Printer** notification destination (see an example scenario: [Automatically Printing Faxes on Printers](#) on page 59).

 **Tip:** For more custom delivery means, you can still ask our Professional Services to provide custom notification destinations in the form of **Python** scripts (see [Enabling Custom Fax Delivery Scenarios](#) on page 59).

For more information on how to configure the above notification destinations, refer to *Notification Destinations* in the online *Administration Guide* (**Help ► Fax Administration Help**).

 **Note:** These destinations can also be used if needed to receive additional notifications for faxes that are sent from your faxing service (destination selection made at the faxing profile level).


## Routing a Fax to a Destination using the Incoming Routing Table

The Incoming Routing Table can route incoming faxes to a variety of destinations by using routing rules (**Fax Settings** from your cloud faxing service portal navigation bar, then select **Incoming Routing Table**).

Here are described the typical rule types you may use to achieve your needs. For more information on how to configure these rules, refer to *Incoming Routing Table* in the online *Administration Guide* (**Help ► Fax Administration Help**).

### Directories Lookup Rule

By default, your Incoming Routing Table contains a single rule of type **Directories Lookup**. This rule instructs the system to route faxes to the users that have been assigned to specific fax numbers via the **Fax Numbers** page of your portal (see [Managing Fax Numbers](#) on page 22).

 **Important:** It is not recommended to remove this rule, but you can add/modify any additional routing instructions to this table.

## Direct Rules


With a **Direct** rule, you can route some incoming faxes to a specific set of destinations. This routing depends on the destination(s) selected and the matching criteria defined in the rule.

The matching criteria are used to narrow the routing based on called numbers (Match DNIS/DID) and caller numbers (Match ANI). These matching criteria can use wildcards, so that you can easily meet your business requirements of routing all faxes (\*) to a remote folder or printing to a specific remote printer all faxes sent to a specific number.

By checking or unchecking the **If this routing entry matches, continue processing the routing table** box in any rule, you can fully control how the logic of routing faxes is executed.

## Default Rule

It is possible to add a **Default** rule to the Incoming RoutingTable. It is always at the bottom of the list and cannot be moved, as it must close the routing table process. If none of the Incoming Routing Table rules selects a destination, the incoming fax will be automatically routed to the destination(s) specified in this rule.

 **Tip:** For more complex routing scenarios, you can still ask our Professional Services to provide custom routing rules in the form of **Python** scripts (see [Enabling Custom Fax Delivery Scenarios](#) on page 59).

## Advanced Solutions

### Polling faxes using the XMediusFAX Web Services

XMediusFAX Cloud offers a programmatic Web Services (SOAP) interface to its fax queues. It can be used to retrieve faxes from 3rd party applications with a SOAP request. Such requests could be invoked through the most popular programming languages (Python, Ruby, C++, Java, .NET, ...) or even using command line applications such as cURL.


### Enabling Custom Fax Delivery Scenarios

If your business process includes special fax routing requirements, the XMediusFAX Cloud Professional Services team can be contacted to develop a solution that meet your needs.

The provided solutions may include Python scripts in Notification Destinations or in Routing Rules; however these scripts cannot be modified by yourself (only by the Professional Services team).

## Automatically Printing Faxes on Printers

This article addresses the most simple and straightforward scenario about using an on-location printer as a fax machine to print all your incoming faxes.

 **Note:** More advanced configurations can be achieved (for a more complex routing where the printer is only one of many destinations). For more information, please consult the fax settings dedicated help (**Help** ► **Fax Administration Help**).

## Configuring your XMediusFAX Cloud to Automatically Print your Incoming Faxes

You must first create a printer destination and then ensure to route all faxes to this printer destination.

## Creating a Printer Destination

1. Select **Fax Settings** in the portal menu.
2. Go to **Notification Destinations ► Printers**
3. Add/configure a Printer Destination according to the model of the printer to be used (see all details in article: [Fax/Notification Printing Integration \(Using Remote Printer Destinations\)](#) on page 52).

## Making your Printer the Default Destination for Faxes

With the following configuration, all users will continue to receive their faxes as before, and all faxes – without distinction – will also be printed on the previously configured printer.

### 1. Go to **Incoming Routing Table**

Basically, your incoming routing table should already contain a **Directories Lookup** rule (to route faxes to users) and a **Default** rule (optional though recommended to take care of misrouted faxes).

2. Ensure to have the following option selected in the existing **Directories Lookup** rule: **If this routing entry matches, continue processing the routing table.**

This will ensure that all faxes will be processed by the following rule (to be created below).

3. Add a **Direct Rule**.
4. Select **Match DNIS/DID** for the routing and enter only an asterisk (\*) for the pattern.
5. In the **Routing Destinations**, **Add** the printer destination that you have configured.
6. Click **OK**.

Now the new **Direct** rule should appear below the **Directories Lookup** rule, and all the faxes will be printed on the selected printer.

## Routing Faxes to Google Drive

With the use of the Google Cloud Printing method in a Printer Destination, you can easily configure your fax service to route your faxes to a Google Drive account. This has several advantages:

- The faxes are available at any time on your Google Drive;
- You can share your faxes with other people with Google accounts;
- You can download them at any time to your workstation;




**Attention:** Using the Google Cloud Print service in your fax routing flow allows Google access to the data contained in your faxes. Under such a configuration, encrypted fax delivery is not guaranteed end-to-end by XMedius. Please refer to Google's terms of service.

## Pre-Requisites

To implement this feature, you need to have a Google account.

## Configuration

1. Access the **Fax > Settings** interface.
2. In **Notification Destinations > Printers**, click **Add** and give the destination a name.
3. Choose **Google Cloud Print** as **Printing Method**.
4. Acquire an **OAuth Token**:

 **Important:** Ensure to be connected to the proper Google Drive account.

- a) Click **Acquire Token**.

You will be asked to give your fax service the permission to access your Google account.

- b) Click **Allow Access**.

5. Back to your Printer Destination configuration, select the *Save to Google Docs* printer.
6. Click **OK** to complete the Printer Destination creation.

 **Important:**

In order to finalize the configuration and allow your faxes to be sent to your Google Drive account, you still need to configure your fax routing mechanism to use the above created Printer Destination. This can be through the Incoming Routing Table (to route incoming faxes) or through a faxing Profile (to use it as additional notification destination).

For more information, please consult the fax settings dedicated help (**Help > Fax Administration Help**).







