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XM Fax Connector 10.0

for Xerox EIP enabled MFPs

Installation Guide

XM Fax Connector for Xerox EIP enabled MFPs

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Patents

• Protected by US Patents 4,994,926; 5,291,302; 5,459,584; 6,643,034; 6,785,021; 7,283,270.

• Protected by Canadian Patents 1,329,852; 2,101,327; 2,417,202.

• Additional US, Europe and Japan patents pending.

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Table of Contents

Chapter 1 : Introduction....1
- The XM Fax Xerox EIP Connector 10.0....1
- Purpose of This Document....2
- Additional Information and Documentation....2

Chapter 2 : Pre-Requisites....3
- Before Installing and Using the XM Fax Connector....3
  - Connector Server Host....3
  - Multi-Function Printers (MFPs)....3
  - Fax Solution....4

Chapter 3 : Installation & Configuration....5
- Installing the XM Fax Connector....5
- Configuring the Connector's General Settings....5
- Creating a Configuration Profile....8
  - Further management of Configuration Profiles....9
- Configuring an MFP to use the Connector....10
  - Further management of the Device list....11
- Configuring and adding several MFPs via CSV....12

Chapter 4 : Maintenance....15
- Updating the XM Fax Connector....15
- Editing the XM Fax Connector Configuration....15
- Uninstalling the XM Fax Connector....16

Chapter 1 Introduction

The XM Fax Xerox EIP Connector 10.0

The XM Fax Xerox EIP Connector 10.0 is an improved faxing solution for Xerox® Multi-Function Printers (MFPs) that support the Xerox® EIP® technology.

With this Connector, your MFP users will benefit from faxing features inherited from your current XM Fax solution (Cloud Service or On-Premises Server) via a dedicated user interface allowing them to:

- Easily scan and fax their documents through XM Fax, and
- Monitor their received/sent and in-progress faxes (depending on Connector permissions).

👉 **Important:** This version of the XM Fax Xerox EIP Connector cannot be used to upgrade versions earlier than 10.0. As such, if you need to use this version on MFPs that are currently using version 2.0 for example, you must first uninstall the previous Connector (according to its documentation) and perform a full installation and configuration of the new Connector, as described in this guide.

Deployment Considerations

Here is an example of deployment including one MFP, the Connector and the XM Fax Server:

Beyond this example, here are a few characteristics to consider for your deployment:

- The Connector is a Windows service typically intended to serve multiple MFPs across your organization. As such, it is not installed on the MFPs but on a server of your network in order to be remotely accessed from the MFPs.
- The Connector can be configured differently according to each MFP, using dedicated configuration profiles. Conversely, the same configuration profile can be shared by multiple MFPs.
- By design, the Connector configuration tool (Web interface) is only accessible locally on the Connector host.
- If the XM Fax solution is an On-Premises server, the Connector can typically be installed on the same host as the fax server.

Note: For the complete list of technical requirements, see *Before Installing and Using the XM Fax Connector* on page 3.

Purpose of This Document

This document is mainly intended for IT administrators and implies basic responsibilities and knowledge over the corporate network, the involved MFP fleet and the XM Fax solution currently used.

In this document are provided:

- All requirements to install the XM Fax Xerox EIP Connector,
- All configuration steps to make the Connector usable from the intended MFPs, and
- Some information for further management and maintenance of the Connector and the affected MFPs.

Additional Information and Documentation

XM Fax Connector User Instructions

A *User Instruction Sheet* is available for download from the XMedius support site, along with the Connector itself and its Installation guide (this document).

It is intended for the end-users of the XM Fax Connector and consists of a single printable page that describes all basic actions that a user can perform from the Connector's user interface displayed on the MFP.

The *User Instruction Sheet* is available in all languages supported by the XM Fax Connector.

XMedius Web Site

For more information about XMedius products and services including the XM Fax Connector, visit the site: *www.xmedius.com*.

Chapter 2 Pre-Requisites

Before Installing and Using the XM Fax Connector

The following requirements must be met in order to install and use the XM Fax Connector.

Connector Server Host

The "Connector Server Host" is the server on which the Connector will be installed in order to be remotely used from the MFPs.

Hardware

- 1 GB RAM minimum allocated for the Connector

OS & software

- Windows Server 2012+
- Any recent Web browser
- Java 1.8 (precisely this version)

Connectivity

- Access to XM Fax, depending on your current solution:
  - Network access to your XM Fax On-Premises server, OR
  - Internet access to the XM Fax Cloud service.
- Network access to communicate with the MFPs.

👉 **Tip:** If the XM Fax solution is an On-Premises server, the Connector can typically be installed on the same host as the fax server. By doing so, you will automatically meet most of the above requirements.

Multi-Function Printers (MFPs)

Any MFP intended to use the XM Fax Connector must meet the following requirements:

- Xerox® EIP® version 3.0+.
- Network access to communicate with the Connector Server Host.

Fax Solution

The XM Fax Connector is compatible with XM Fax 8.0 and above versions, as well as with the XMedius's cloud-based fax solution (details below).

If using XM Fax Cloud Service

You need to have an XMedius Cloud enterprise account with the XM Fax service enabled.

If you do not have such an account yet, please contact your XM Fax reseller.

If using XM Fax On-Premises Software

You need to have a running XM Fax On-Premises server that meets the following requirements:

- Your XM Fax software:
  - must be version 8.0+ (hotfixes may be required, see below), and
  - must be already configured according to your needs.
- Your XM Fax license must include:
  - The Web Services feature.
  - The maximum number of MFPs that are allowed to use the XM Fax Xerox EIP Connector.
- The following minimum required hotfixes must be installed on your XMediusFAX server, depending on your version:

XMediusFAX version	Minimum Required Hotfixes
XMediusFAX 8.0	• Web Service (faxservice.war) 8.0.0.395
XMediusFAX higher versions	No specific hotfix required.

For more details on XM Fax, please refer to its *Installation and Maintenance Guide* and its *Administration Guide*.

Chapter 3 Installation & Configuration

Installing the XM Fax Connector

Important: The XM Fax Connector must be installed on a server that meets specific requirements (see *Before Installing and Using the XM Fax Connector* on page 3).

1. Run the XM Fax Connector installer:

   `XMediusFAX Xerox EIP Connector <version>.exe`

2. Follow the on-screen instructions to perform the installation.
3. When the installation is complete, leave the **Open the connector configuration page** option selected and click **Finish**.

The XM Fax Connector is now installed and its service is already running. Your default Web browser opens to allow you to perform the first required configuration. See *Configuring the Connector's General Settings* on page 5.

Note: For further reference:

- Default installation path: `C:\Program Files (x86)\XMediusFAX Xerox EIP Connector`
- Connector's Windows service name: **XMFEIPConnector**

Configuring the Connector's General Settings

Configuring the General Settings is required to ensure a proper connectivity between the Connector, the MFPs and your current XM Fax solution.

Important: This configuration can only be performed locally on the XM Fax Connector's host.

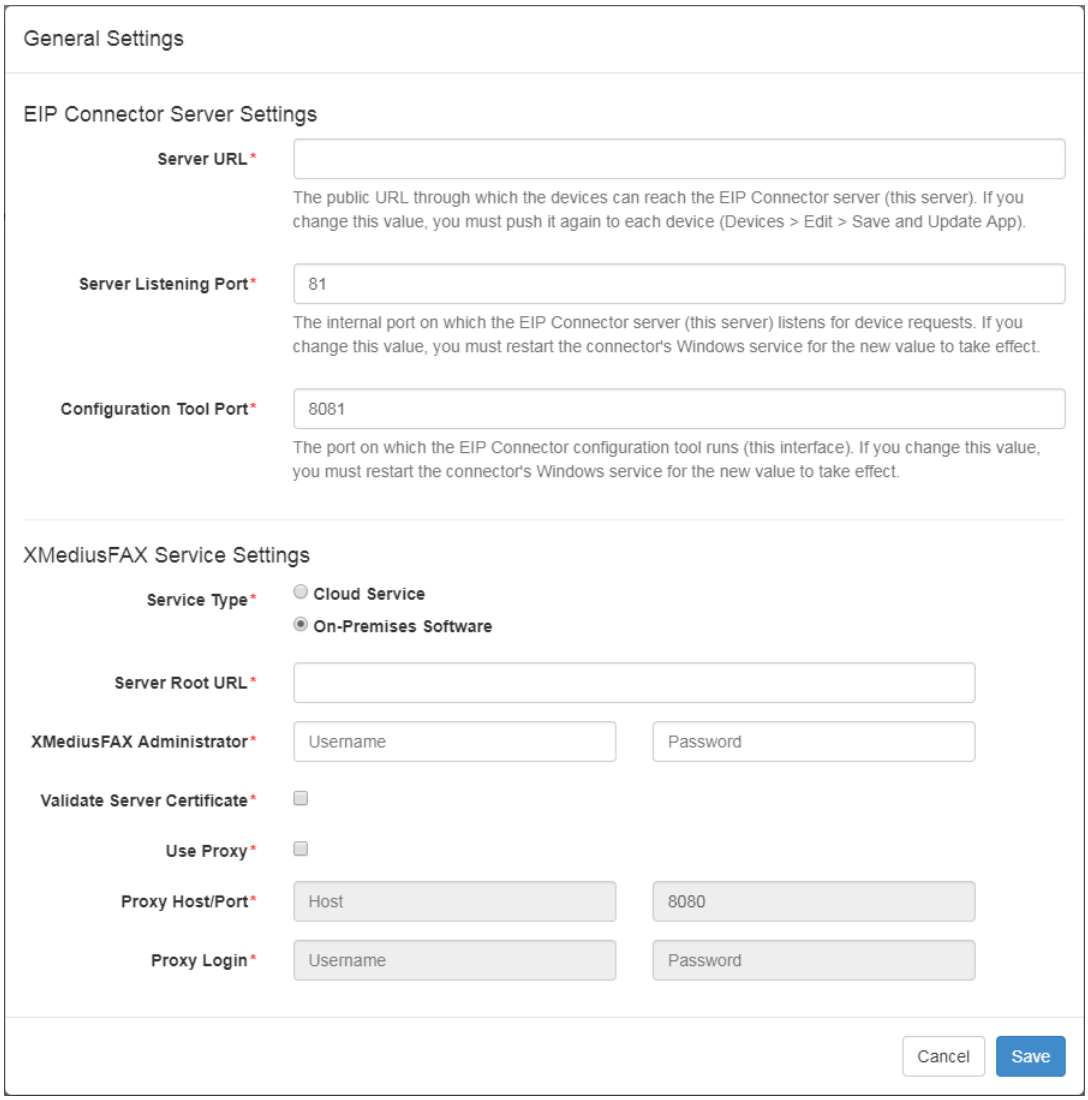
Note: The following procedure must be performed before starting to configure MFPs to use the Connector.

1. Access the XM Fax Connector configuration tool.

   - If you just finished the Connector installation, this page should automatically open in your Web browser.
   - Otherwise, use the URL: `http://localhost:8081`.

   The General Settings screen will automatically appear when you access this interface, until the configuration is complete.

   Otherwise, use the ⚙ button at the top right of the screen.



2. Configure the **EIP Connector Server Settings**:

Setting	Description	Default
Server URL	The public URL through which the MFPs can reach the EIP Connector server, in the form: `http://<connector_server_IP>:<Port>` For example: `http://172.17.0.12:81` • You can specify the Connector host name instead of its IP address, if needed. • Specifying the port is mandatory. Typically, specify the same value as for the **Server Listening Port**. 👉 **Note:** If you change this value afterward, you must push it again to each MFP (**Devices ➤ Edit ➤ Save and Update App**) to maintain a proper connectivity.	
Server Listening Port	The internal port on which the EIP Connector server listens for MFP requests. Typically, this port will be the same as the one specified in the **Server URL**. 👉 **Note:** If you need to change this value, you must restart the Connector's Windows service for the new value to take effect.	`81`

Setting	Description	Default
Configuration Tool Port	The port on which the EIP Connector configuration tool runs. **Note:** If you need to change this value, you must restart the Connector's Windows service for the new value to take effect.	`8081`

3. Configure the **XMediusFAX Service Settings**:
   a) Select the **Service Type** depending on your current XM Fax solution, and accordingly enter the information required to access the service:
   - For **Cloud Service**:

Enterprise Account	The name that uniquely identifies your enterprise in the XMedius Cloud platform. Among others, the "Enterprise Account" is used within URLs to reach your account. For example, this name should look like `mycompany`.
Access Token	Required to provide the App with proper service access permissions. You need to use the XMedius Cloud portal to create an Access Token for the enterprise account, with permissions **Query user directory** and **Send and manage faxes**.

   - For **On-Premises Software**:

Server Root URL	The URL to reach your XM Fax server, in the form: `https://<FaxServer_HostName_or_IP>:8443`
XMediusFAX Administrator	The username and password of a system administrator of your XM Fax system, required for the access via the Web Services.

   b) Select and configure the following options according to your needs:

Validate Server Certificate (optional but recommended)	Enables an additional security for the Web Service connection to XM Fax, by validating the server identity through its certificate. **Attention:** Leaving this option disabled would represent a vulnerability that could be exploited by a malicious user to intercept and modify your fax traffic, as no server identity validation would be performed by the XM Fax Connector before sending fax data using the specified Fax Service URL. **Important:** If you are using the XM Fax Cloud service, you must enable this option. Note that the XM Fax Cloud certificate is signed by a trusted authority (no further configuration is required). If you are using the XM Fax On-Premises solution, enabling this option additionally requires to have a valid SSL certificate installed on the XM Fax host: • The certificate should ideally be signed by a trusted certificate authority and must not be expired, and • The *<FaxServer_HostName_or_IP>* value specified in the **Server Root URL** field must match the Common Name (CN) of the certificate.
Use Proxy	Enables the use of a proxy to connect to the XM Fax server if needed. Parameters: • **Proxy Host/Port** (the hostname or IP address of the proxy and its port). • **Proxy Login** (the username and password for authentication on the proxy).

4. Click **Save** to complete the XM Fax Connector General Settings configuration.

You can now start configuring your MFPs to use the Connector – which first requires at least the creation of a Configuration Profile.

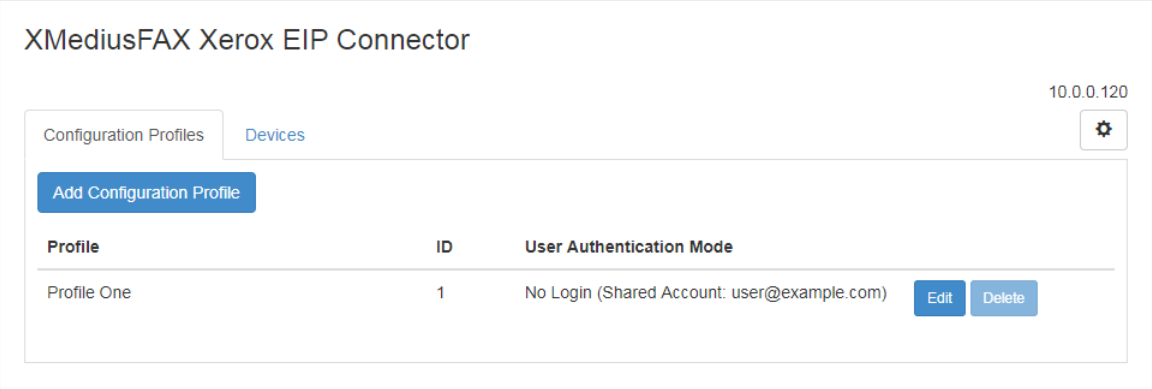
Creating a Configuration Profile

A Configuration Profile is always required to be able to configure an MFP to use the XM Fax Connector.

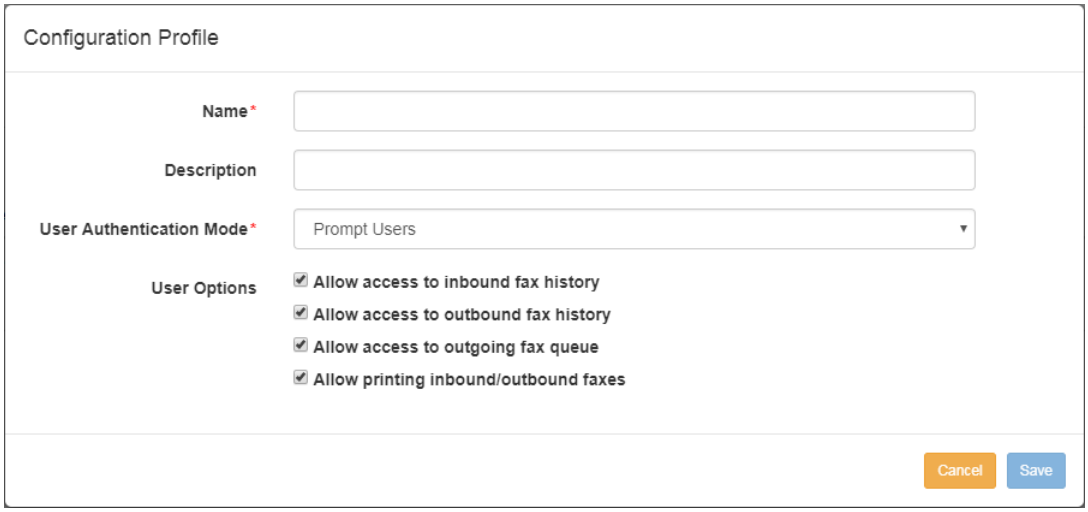
👉 **Important:** This configuration can only be performed locally on the XM Fax Connector's host.

From the XM Fax Connector configuration tool (`http://localhost:8081`):

1. Select the **Configuration Profiles** tab.



2. Click **Add Configuration Profile**.



3. Enter information to identify the Configuration Profile:

Name	The display name of the Configuration Profile.
Description	Optional text for further description (context, purpose...).

4. Configure the **User Authentication Mode**:
   Select an authentication mode for the XM Fax Connector users.

   👉 **Note:** All modes require some user creation/management in the XM Fax server/service prior to using the XM Fax Connector.

Mode	Description	Additional Required Configuration
No Login	All users will share the same account and will not be presented with a login screen.	Enter the user identifier* corresponding to the user account that will be shared on the MFP.
Prompt Users	Users will always be prompted to enter their user identifier* and password.	No additional configuration required.
Use Device Login	Users will login using the authentication services of the MFP.	Ensure that your MFP users will be able to match the user identifiers* of the accounts defined in XM Fax. This may require some additional configuration: • on the MFP (see the manufacturer's documentation), and • on XM Fax (see your XM Fax administration guide or online help about Directories Integration).

** Depending on your XM Fax service type (on-premises server or cloud service), the user identifier may be an email address or a username.*

5. Enable or disable the **User Options** according to your needs:

Allow access to inbound fax history	The users will have access to their inbound/outbound/outgoing faxes from the Connector's user interface on the MFP according to the hereby selected options.
Allow access to outbound fax history	
Allow access to outgoing fax queue	
Allow printing inbound/outbound faxes	The users will be able to print their faxes from the Connector's interface on the MFP (depending on the above fax history access permissions).

6. Click **Save** to complete the creation of the Configuration Profile.

The Configuration Profile is now added to the list and you can add and configure one or several MFPs to use it.

👉 **Note:** If you plan to configure several MFPs in batch by CSV, take note of the **ID** displayed in the list for each Configuration Profile you may have created here. You will need to provide them in the CSV file to ensure a reliable mapping with the Configuration Profiles you will assign to your MFPs.

Further management of Configuration Profiles

From the XM Fax Connector configuration tool (`http://localhost:8081`):

Add Configuration Profile	You can create as many additional Configuration Profiles as needed. A single one can however be used by several MFPs, depending on your needs.
Edit	If you change and save the settings of a Configuration Profile, they are automatically applied to all MFPs that are using this Configuration Profile (although this could take a few minutes to take effect).
Delete	You cannot delete a Configuration Profile if at least one MFP is configured to use it.

Configuring an MFP to use the Connector

To be able to use the XM Fax Connector from an MFP, you must add this MFP to the Connector's **Devices** list. This will automatically create an app link (with icon) on the main screen of the MFP.

This procedure provides the instructions to add a single MFP to the list.

If you need to add multiple MFPs in batch, see *Configuring and adding several MFPs via CSV* on page 12.

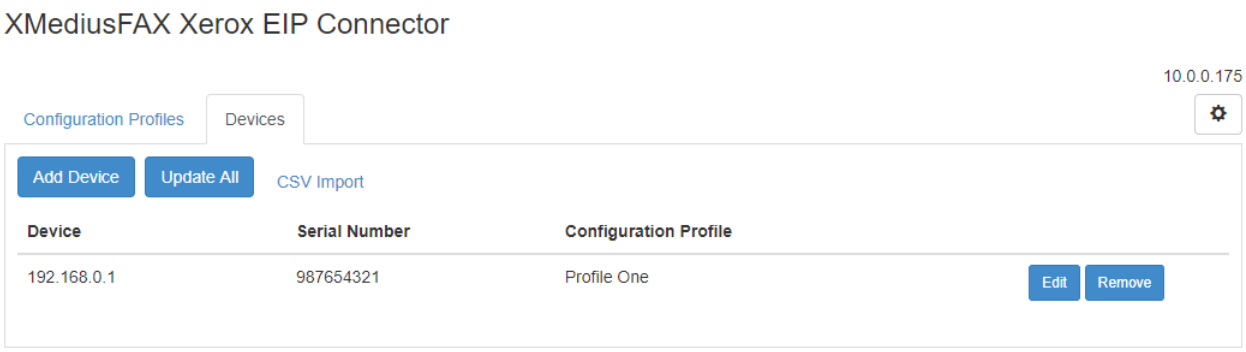
Important: This configuration can only be performed locally on the XM Fax Connector's host.

Note: Before starting to add MFPs to the list:

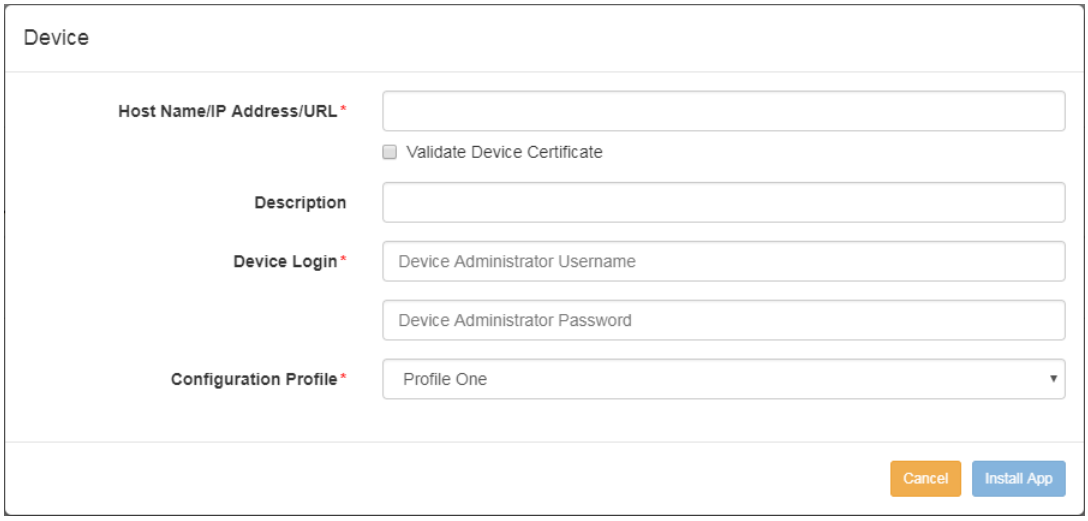
- You must have created at least one Configuration Profile (see *Creating a Configuration Profile* on page 8).
- You must have properly completed the configuration of the General Settings (see *Configuring the Connector's General Settings* on page 5).

From the XM Fax Connector configuration tool (`http://localhost:8081`):

1. Select the **Devices** tab.



2. Click **Add Device**.



3. Enter the information about the MFP:

Host Name/IP Address/URL	Enter the address information to reach the MFP from the Connector host. It is recommended to use HTTPs and specify the IP address of the MFP, as follows: `https://<Device_IP>` Other options: • You can specify the host name of the MFP instead of its IP address, if needed. • You can omit the `https://` part if you need to use HTTP (not secure) instead of HTTPs. • You can specify a port if needed, by adding `:<port>` to the address/host name.
Validate Device Certificate (optional but recommended)	Enables an additional security while performing the MFP configuration through HTTPs, by validating the MFP identity through its certificate. **Attention:** Leaving this option disabled would represent a vulnerability that could be exploited by a malicious user to intercept and modify your configuration, as no MFP identity validation would be performed by the Connector before configuring the MFP through the specified **Host Name/IP Address/URL**. **Important:** Using this option requires to have a valid SSL certificate installed on the MFP: • The certificate should ideally be signed by a trusted certificate authority and must not be expired, and • The *<Device_IP>* value specified in the **Host Name/IP Address/URL** field must match the Common Name (CN) of the certificate.
Description	Optional text description for MFP identification (name, model, location).
Device Login	The **Device Administrator Username** and **Password** are required to allow the remote configuration of the MFP (app link installation).

4. Select a Configuration Profile for the MFP:

Configuration Profile	Choose the proper Configuration Profile to allow the MFP to use the XM Fax Connector according to the settings and options you previously configured (see *Creating a Configuration Profile* on page 8).

5. Click **Install App** to complete the configuration and install an app link (to the Connector) on the MFP.

The MFP now appears in the list and the XM Fax Connector can be used from this MFP: an XM Fax icon should be available on the MFP home screen.

Remember: For more information on the XM Fax Connector user interface, see the *User Instruction Sheet* that is available for download from the XMedius support site.

Further management of the Device list

From the XM Fax Connector configuration tool (`http://localhost:8081`):

Add Device	You can add as many MFPs as needed. Each MFP from which you need to access the XM Fax Connector must have an entry in this list.
Update All	Pressing this button will automatically update all the MFPs in the Device list to the current General Settings.
CSV Import	See *Configuring and adding several MFPs via CSV* on page 12.
Edit	If you change and save the settings of a listed MFP, the app link is automatically updated on this MFP (if the MFP is reachable at that time).

Remove	If you remove an MFP from the list, the app link and icon will also be removed from this MFP (if the MFP is reachable at that time).

Configuring and adding several MFPs via CSV

This procedure provides the instructions to add multiple MFPs in batch to the **Devices** list of the Connector. By doing this, an app link (with icon) will be automatically created on the main screen of each intended MFP in order to use the Connector. Note that this procedure remains applicable if you need to update multiple MFPs in batch.

Important: This configuration can only be performed locally on the XM Fax Connector's host.

Note: Before using a CSV file to add MFPs to the list:

- You must have created at least one Configuration Profile (see *Creating a Configuration Profile* on page 8).
- You must have properly completed the configuration of the General Settings (see *Configuring the Connector's General Settings* on page 5).

From the XM Fax Connector configuration tool (`http://localhost:8081`):

1. Prepare a CSV file with the following headers and values:

   Note: The first line of the file must include the headers and each subsequent line will define a single MFP configuration. You can write the headers in any order, as long as the corresponding values are provided in the same order.

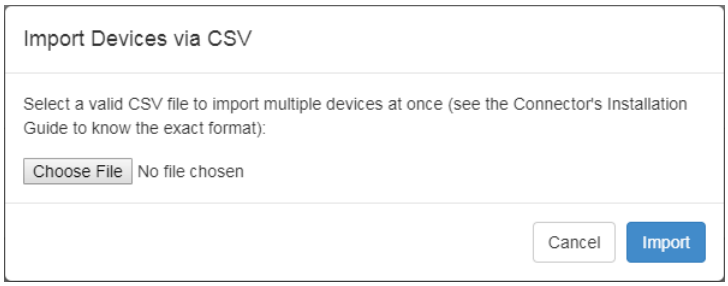
Header	Value
`hostname`	Host Name/IP Address/URL to reach the MFP from the Connector host*.
`validateCertificate`	Specify `true` or `1` to enable MFP certificate validation* (recommended). An empty value (or `false` or `0`) will leave the option disabled.
`description`	Optional text description for MFP identification (an empty value is at least required if the header is present).
`adminUsername`	The MFP administrator username and password.
`adminPassword`	
`profileId`	Specify the **ID** number displayed in the Configuration Profile list (and not the profile name).

   ** For more details on these settings, see Configuring an MFP to use the Connector on page 10.*

   Example of valid CSV file content:

```
hostname,validateCertificate,description,adminUsername,adminPassword,profileId
https://172.17.0.150,true,Central Room,admin02,Pas$02,4
172.17.0.151,false,,admin02,Pas$02,3
https://172.17.0.152:82,true,Accounting,admin03,Pas$03,4
```

2. Select the **Devices** tab from the Connector configuration tool and click **CSV Import**.



3. Browse and select the CSV file previously created and click **Import**.
   The operation may take some time to complete depending on the number of MFPs to import. If no error message is displayed, this means that all MFPs were imported.

The MFPs are now added to the list and the XM Fax Connector can be used from these MFPs (an app icon should be available on the MFP home screen).

👉 **Note:** If an MFP listed in the CSV file was already present in the **Devices** list (according to its `hostname` value), its configuration will be automatically updated with the values specified of the CSV file.

Chapter 4 Maintenance

Updating the XM Fax Connector

Important: This version of the XM Fax Xerox EIP Connector cannot be used to upgrade versions earlier than 10.0. As such, if you need to use this version on MFPs that are currently using version 2.0 for example, you must first uninstall the previous Connector (according to its documentation) and perform a full installation and configuration of the new Connector, as described in this guide.

To update the XM Fax Connector from version 10.0+ to a newer version (including minor version updates), simply run the new installation program (see *Installing the XM Fax Connector* on page 5).

The installed version will automatically be detected and updated, and the existing configurations (General Settings, Configuration Profiles, Devices) will be kept unchanged. However, you may need to update the MFP app links afterward (see *Editing the XM Fax Connector Configuration* on page 15).

Editing the XM Fax Connector Configuration

All Connector configuration changes must be performed from its configuration tool, using your Web browser.

To edit the Connector's General Settings

Use the ⚙ button at the top right of the screen and save after modifying the intended settings.

Attention: Any change in General Settings may require to restart the Connector's Windows service or to reconfigure all your MFPs.

See *Configuring the Connector's General Settings* on page 5 for more details.

To edit a Configuration Profile

Click on **Edit** in the **Configuration Profiles** list and save after modifying the intended settings.

Attention: Any change in a Configuration Profile will automatically affect all MFPs that are using this Configuration Profile. See *Creating a Configuration Profile* on page 8 for more details

To edit MFP configurations

- For a single MFP configuration change, click on **Edit** in the **Devices** list and save after modifying the intended settings (see *Configuring an MFP to use the Connector* on page 10 for more details).
- For multiple MFP configuration changes, click on **Update All** in the **Devices** list (see *Configuring an MFP to use the Connector* on page 10 for more details). You can also make multiple MFP configuration changes in batch using a CSV file (see *Configuring and adding several MFPs via CSV* on page 12).

Uninstalling the XM Fax Connector

To remove the XM Fax app link and icon from an MFP

Access the **Devices** tab within the XM Fax Connector configuration tool, find the intended MFP in the list and click on **Remove**.

To uninstall the XM Fax Connector from its host

Simply use the Windows program uninstallation functionality and search for **XMediusFAX Xerox EIP Connector**.

Attention: If you uninstall the Connector, your users will no longer be able to use it from all MFPs of the **Devices** list. If it is however your intent, it is recommended to remove the app link from all affected MFPs prior to uninstalling the Connector.

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