

# Installing GFI FAXmaker

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## System Requirements

Before you install GFI FAXmaker, please ensure that you meet all the following requirements.

### GFI FAXmaker FAX Server:

- A Windows 2000 or 2003 server machine with at least 256 Mbytes of RAM and an 800 MHZ processor.
- A professional fax device: A Brooktrout TR 114, TR 1034 or Trufax fax board, an EICON DIVA PRO/SERVER fax card or an AVM active fax card. You can use class 2 or 2.0 fax modems using either the Microsoft or the GFI fax modem drivers, although we strongly recommend using one of the fax devices listed above. For a complete list go to <http://kbase.gfi.com/showarticle.asp?id=KBID001220>
- If you are installing GFI FAXmaker on a separate machine, the IIS SMTP service will need to be installed. The IIS SMTP service is included in every Windows distribution, including Windows professional. To verify the Installation of the SMTP Service: In Control Panel, open Add/Remove Programs, click Add/Remove Windows Components. Click the Internet Information Services (IIS) component, click Details, and then verify that the SMTP Service check box is selected. If it is not selected, click to select it, click OK, and then follow the installation directions that are displayed.
- If you are using Microsoft Exchange Server, and are not installing the fax server on the Exchange server machine, you must install Microsoft Outlook on the fax server machine and configure it to connect to a mailbox (via MAPI) on the Microsoft Exchange server machine. This is needed for conversion of TNEF to MIME.
- If using Windows 2000, ensure you have Service Pack 3 or later installed.
- **IMPORTANT:** Disable Anti Virus software from scanning the GFI FAXmaker & other relevant directories! AV products are known to both interfere with normal operation as well as slow down any software which requires file access. In fact Microsoft does not recommend running file based anti virus software on the Exchange Server. For more information: <http://kbase.gfi.com/showarticle.asp?id=KBID001523>
- Make sure that backup software is not backing up any of the GFI FAXmaker directories at any point.

### GFI FAXmaker client:

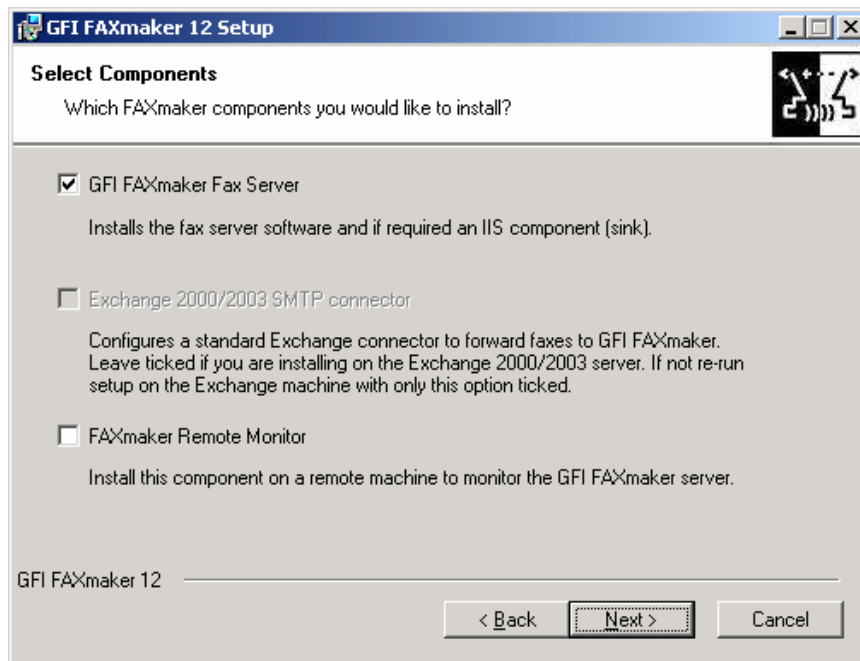
- Windows 95 or higher.
- Windows XP/2000/2003, Windows 95/98/ME or Windows NT Server/ Workstation 4.0.
- If using Windows 2000, ensure you have Service Pack 3 or later installed.

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## Installing the GFI FAXmaker server software

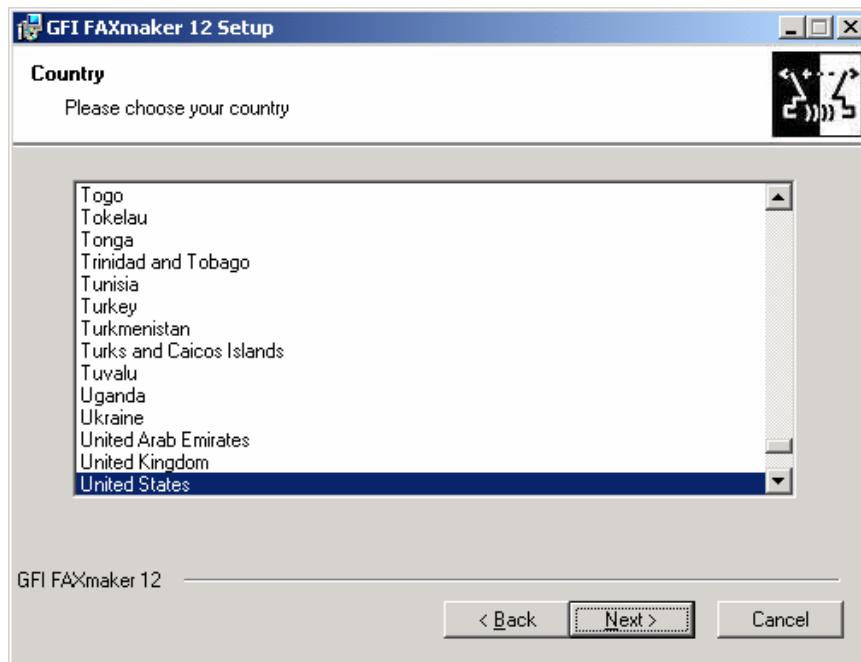
Before running the installation procedure, please make sure that you are logged on as Administrator.

1. Run GFI FAXmaker set-up by double-clicking on the file **faxmaker12.exe**. Click Next to start installation.
2. Select the language in which you want GFI FAXmaker to appear and click OK. A welcome dialog will appear. Close other Windows programs and click **Next**.
3. In the License agreement dialog box, review the license agreement and click **Yes** to continue the installation.
4. Enter your name, company name and License key. If you are evaluating the product, leave the default 'Evaluation' key. Click **Next**.



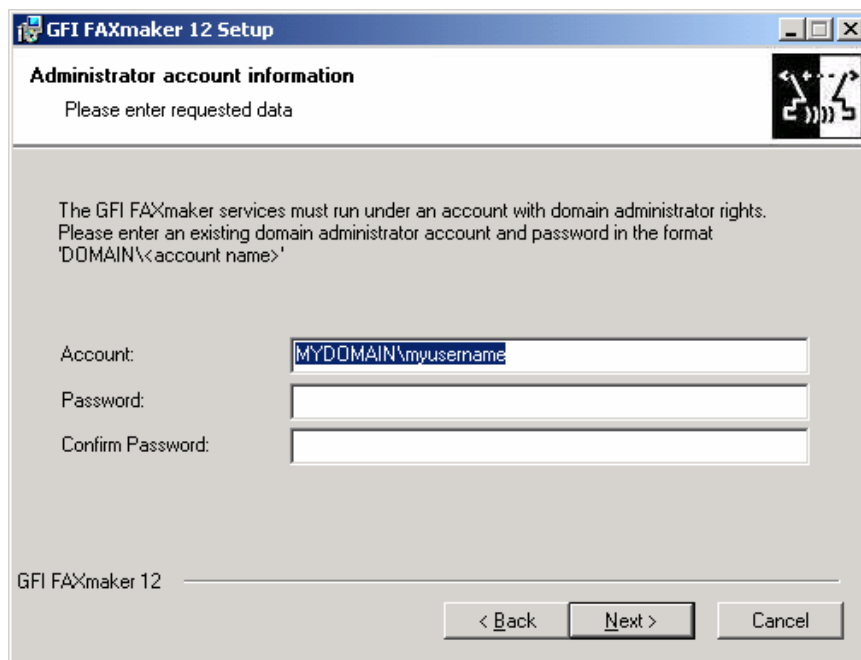
Screenshot 33 - Selecting what components to install

5. Set-up will ask you which components you want to install. If you are installing GFI FAXmaker on the Exchange 2000/2003 server machine, you will need to tick both the GFI FAXmaker Fax server component and the Exchange 2000/2003 SMTP connector component. If you are installing it on a separate machine, or are not using Exchange 2000/2003, just install the GFI FAXmaker Fax server component. (Afterwards re-run set-up on the Exchange server machine to install just the Exchange connector)




Screenshot 34 - Selecting your country

6. Select the country in which you are located and click **Next**.



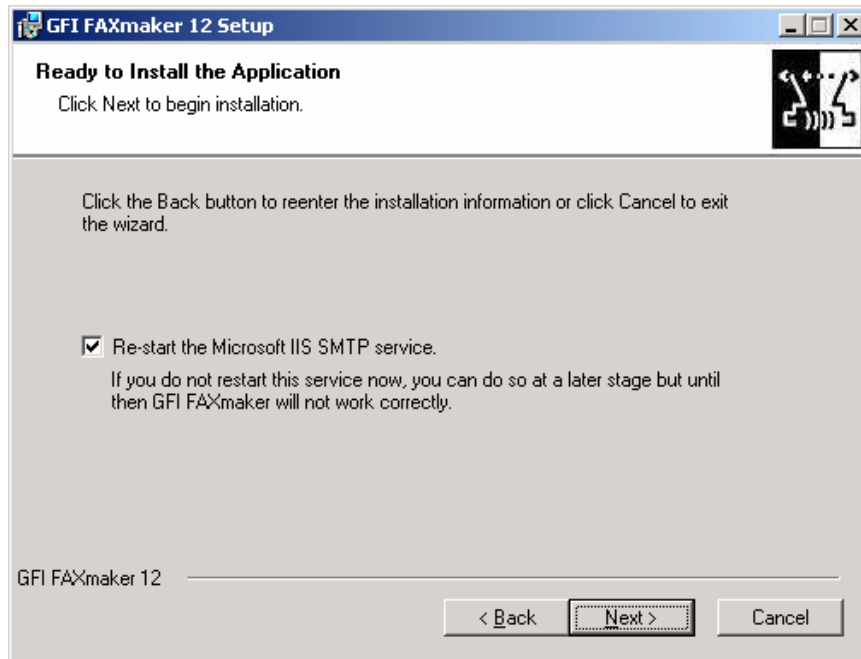
Screenshot 35 - Account name for services

7. Set-up will ask you for an administrator account and password to install the GFI FAXmaker services.

 If you change your password after installing GFI FAXmaker, you must update the password for the GFI FAXmaker services from the Services Control Panel as well; otherwise the GFI FAXmaker services will no longer start!

8. Choose the destination location for the Fax server modules and click **Next**. GFI FAXmaker will need approximately 40 MB of free hard disk space. In addition to this you must reserve approximately 200-

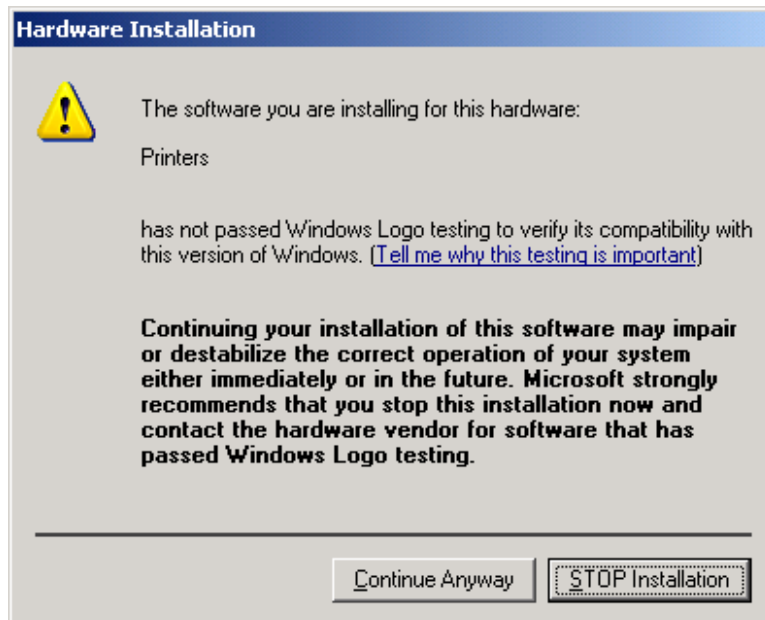
300 MB for fax data storage during operation. The actual disk space used depends on the quantity of faxes being sent.



Screenshot 36 - Restart the IIS SMTP service

9. Set-up will need to restart the IIS/Exchange SMTP service. Click Next.

10. Set-up will now copy the files to the GFI FAXmaker destination folder. After the files have been copied, set-up will confirm the installation of the GFI FAXmaker and NetprintQueue2fax printer driver. Click 'Next' to proceed.



Screenshot 37 - Confirm printer driver installation

11. Windows will confirm installation of uncertified drivers (Almost no vendors certify them because it's a very time intensive and bureaucratic process). Click Continue Anyway to proceed.

After this, you have the option of running the GFI FAXmaker configuration wizard, which will guide you through the elementary steps of setting up GFI FAXmaker. Click 'Finish' to launch the GFI FAXmaker Configuration Wizard.

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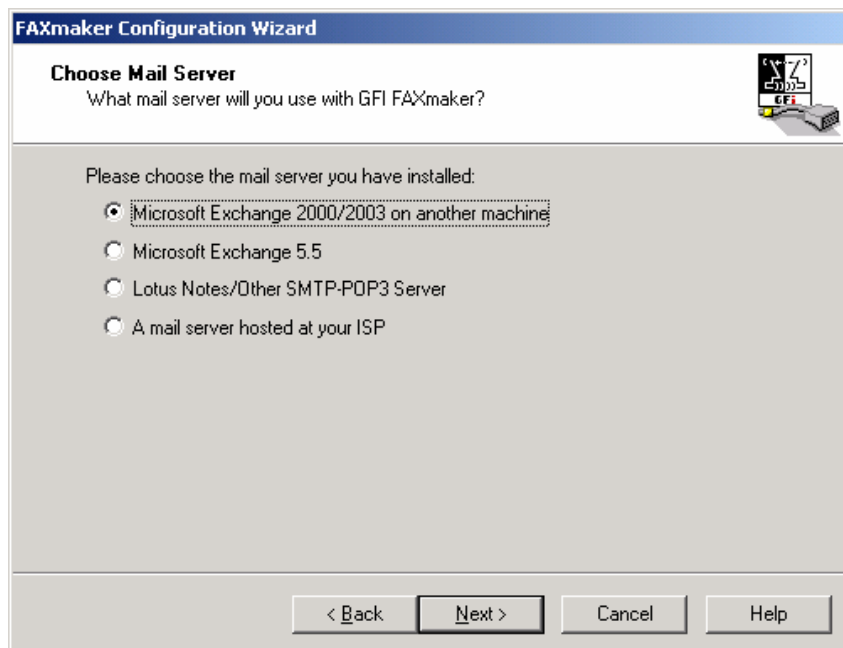
## Running the GFI FAXmaker configuration wizard



Screenshot 38 - The GFI FAXmaker configuration wizard

The GFI FAXmaker Configuration Wizard will walk you through the basic steps of configuring GFI FAXmaker. Click Next to start the wizard.

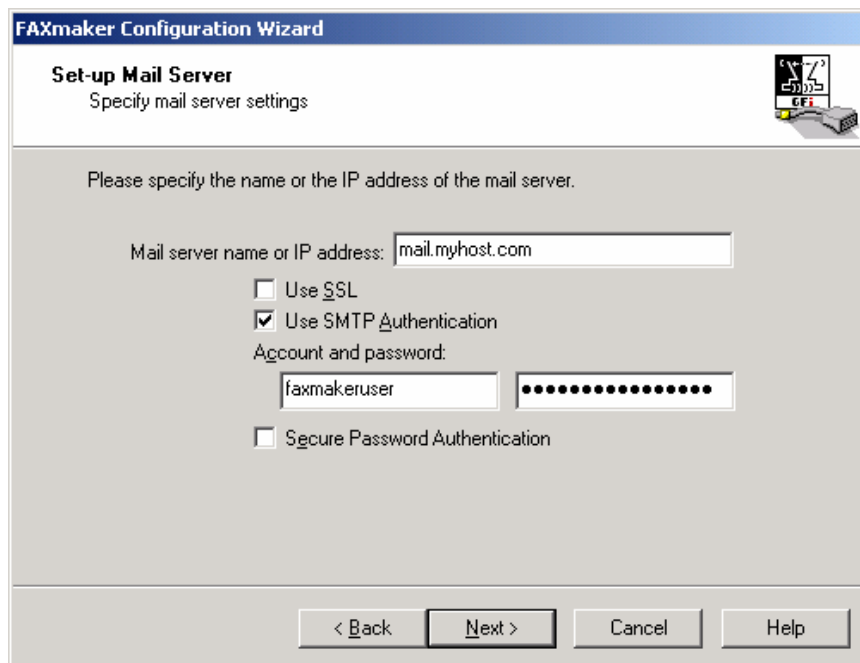
### Step 1: Choosing your mail server



Screenshot 39 - Choose your mail server

Unless you are installing GFI FAXmaker on an Exchange 2000/2003 server, the wizard will prompt you what type of mail server you are using. If you select:

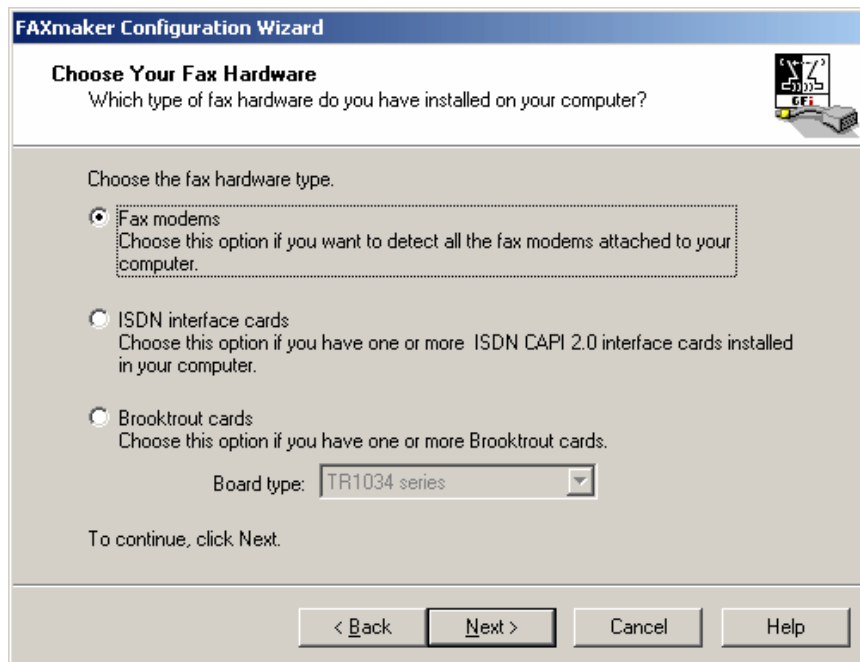
- Microsoft Exchange 2000/2003 on another machine or Microsoft Exchange 5.5, the wizard will prompt you for the **IP** of the Exchange server machine name. The IP is required and not the machine name, since set-up has to allow relaying from the Exchange Server to the GFI FAXmaker fax server machine. If your mail server requires authentication to send mails, enter authentication details.
- Lotus Notes/Other SMTP/POP3 server, the wizard will prompt you for a machine name or IP and a dedicated POP3 mailbox name and password. If your mail server requires authentication to send mails, enter authentication details.
- Mail server hosted at an ISP, the wizard will prompt you for the IP of the mail server machine. If your mail server requires authentication to send mails, enter authentication details.



Screenshot 40 - The wizard will prompt you for a mail server name

After you have configured the mail server, click next. The wizard will try to connect to the specified mail server to ensure the mailserver responds at that IP (Note that authentication settings are only tested at the end). For more information how GFI FAXmaker 12 integrates with each type of mail server, review the paragraph 'How to deploy GFI FAXmaker for Exchange/SMTP 12' in the previous chapter.

## Step 2: Configuring the fax devices

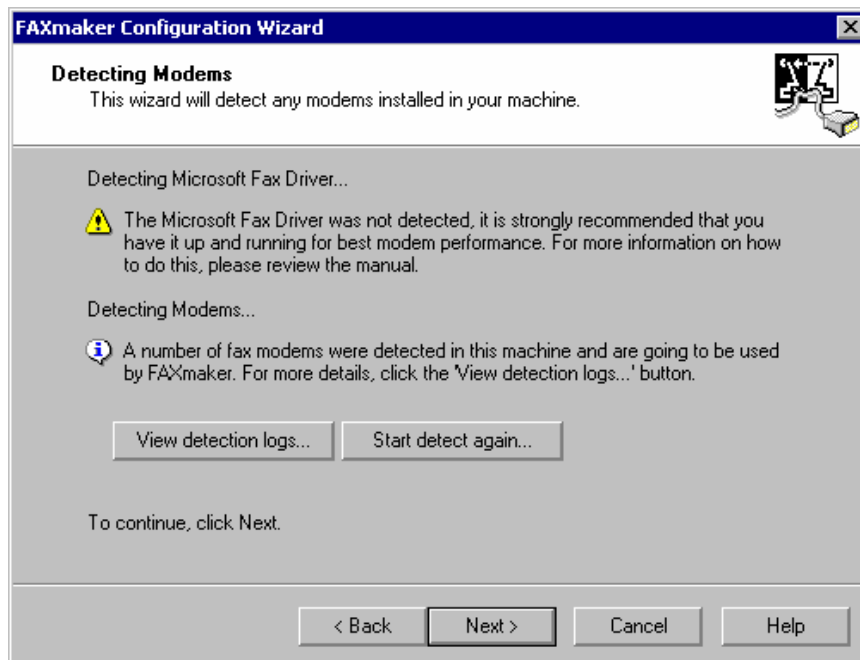


Screenshot 41 - Selecting the type of fax hardware to be used with GFI FAXmaker

The configuration wizard will now prompt you which fax device (s) you wish to use with GFI FAXmaker.

### ***If you use Fax modems:***

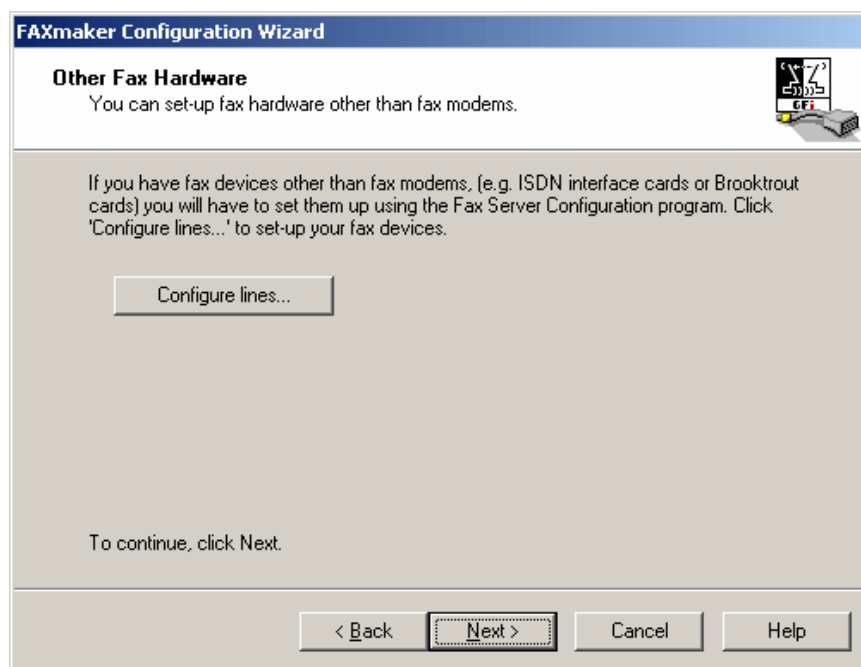
GFI FAXmaker will try to detect modems already installed on your machine. GFI FAXmaker will first try to detect any Microsoft Fax drivers that are installed.



Screenshot 42 - Detecting modems present on your machine

### ***If you use ISDN or Brooktrout cards***

**NOTE:** If you use ISDN or Brooktrout fax cards, ensure that you have properly installed the cards first. You will have to configure the fax lines manually. Click 'Configure lines' and configure the fax line(s).



Screenshot 43 - Configuring lines if you are using Brooktrout or ISDN fax cards

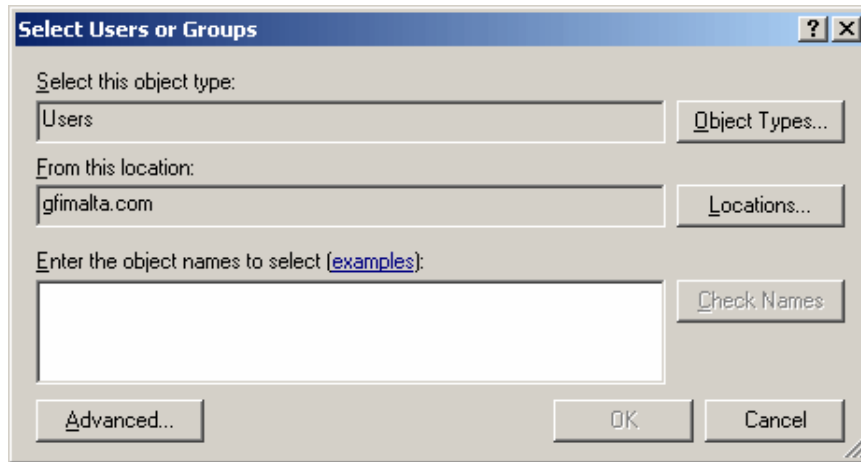
### **Step 3: Specifying the fax administrator & users**

After you have installed and configured the fax devices you have to specify the fax users (you can change this later but you must specify at least one fax user now). GFI FAXmaker is licensed based on the number of users that receive OR send faxes. The procedure is different depending on whether you have Active Directory or not:

#### ***If you have Active Directory***

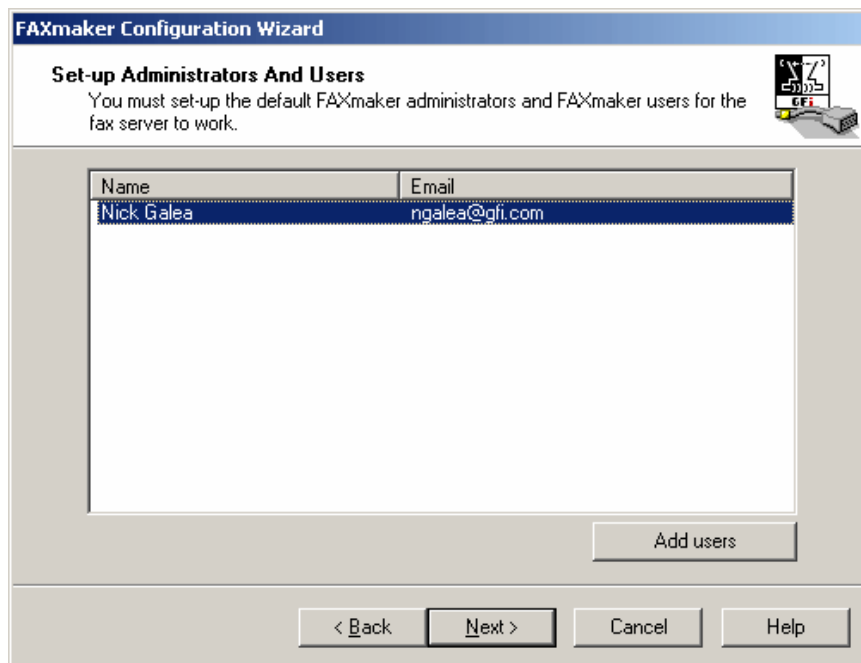
If you use Active Directory on your network (i.e. you have one or more Windows Server 2000 machines or higher), FAXmaker will connect to Active Directory and allow you to specify FAXmaker users and user based rules by selecting users from Active Directory, rather than using its own user database. This greatly reduces user administration.

GFI FAXmaker will rely on the email address specified for each user in active directory. If you use Microsoft Exchange 2000/2003, or any Active Directory integrated mail server (including Windows 2003 POP services) this email address is automatically filled in correctly. **If you use Exchange 5.5 or a non active directory integrated mail server, then you have to enter a correct email address for each user that you want to 'fax-enable' in the Email field of the user properties. This can be done from Active Directory Users and Computers.**



Screenshot 44 - Selecting administrator and users from Active Directory

The GFI FAXmaker wizard will bring up the standard 'Select Users or Groups' dialog and allow you to specify a fax user.



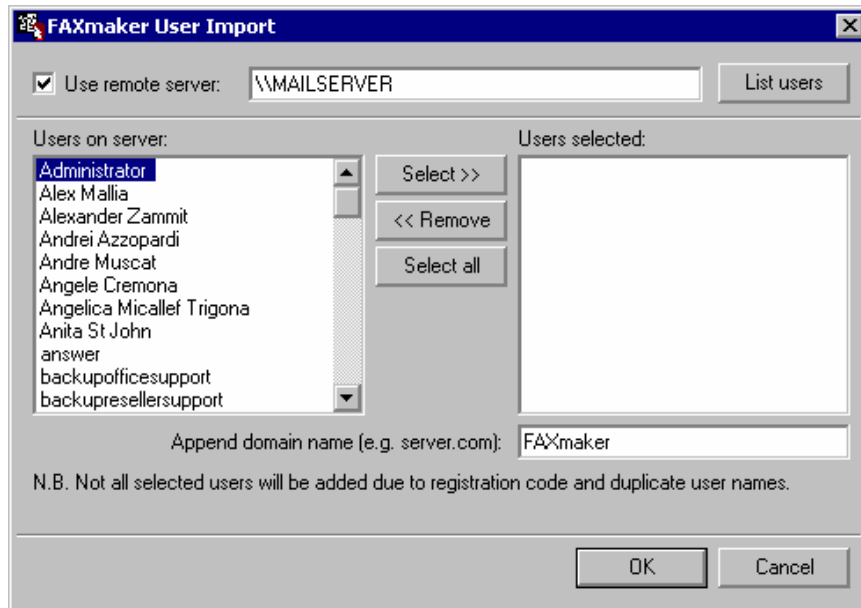
Screenshot 45 - Specifying users

After this, the GFI FAXmaker wizard will show the selected user. You can proceed to specify additional fax users by clicking on the 'Add users' button. You can also specify users later on in the GFI FAXmaker configuration.

***If you don't have Active Directory***

If you don't have a Windows Server 2000 or higher, and therefore do not have Active Directory, you will have to configure the GFI FAXmaker users by importing the users from a Windows machine, from a CSV list or by creating them manually. The latter can only be done from the configuration after you have completed the GFI FAXmaker configuration wizard. To import the users from a Windows machine:

1. GFI FAXmaker will default to the domain controller machine and list all available users. You can enter a different server name and click 'list users' if you want to import users from another machine.



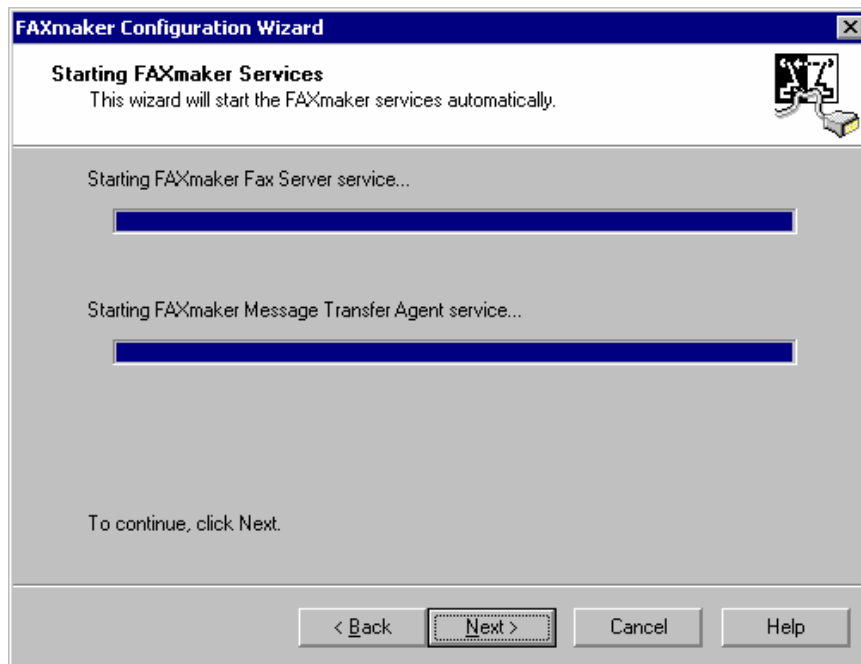
Screenshot 46 - Importing GFI FAXmaker users from Windows NT or local user database

2. All retrieved users will be listed in the left hand list box. Select which you users will be FAXmaker users and click on the 'Select' button.

3. GFI FAXmaker will require a valid email address for each GFI FAXmaker user. GFI FAXmaker can automatically append your domain name to each user that you import, using the 'Append domain name' function at the bottom of the GFI FAXmaker user import dialog. This function will append your domain to the windows logon name. If your email addresses do not follow this convention, you will have to specify the correct email address in the User's personal tab. To do this, double-click on the user name, select the personal tab, and specify the email address in the Email address edit box.

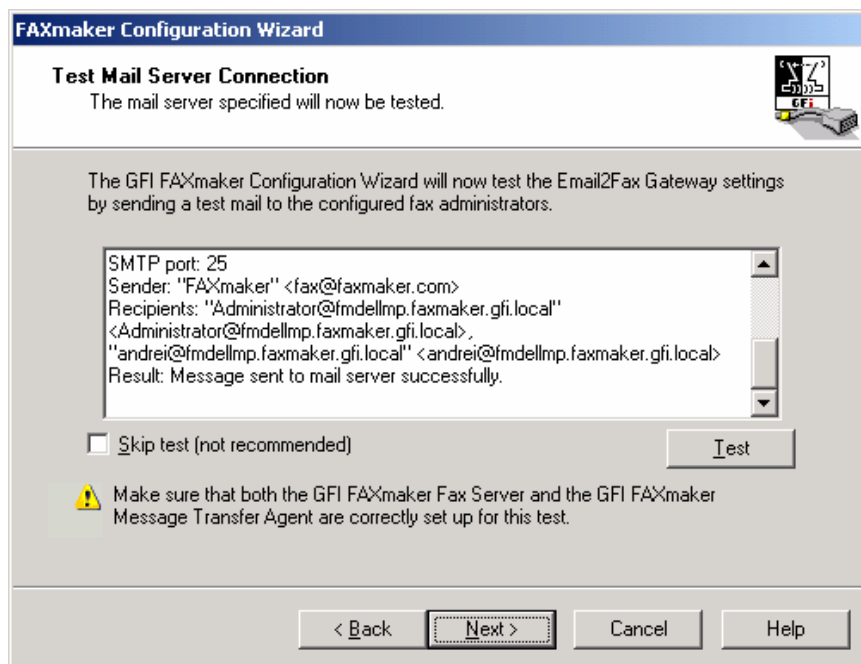
4. Click OK to proceed with the import. GFI FAXmaker will automatically configure default settings for each user.

## Step 4: Test the mail server connection and start services



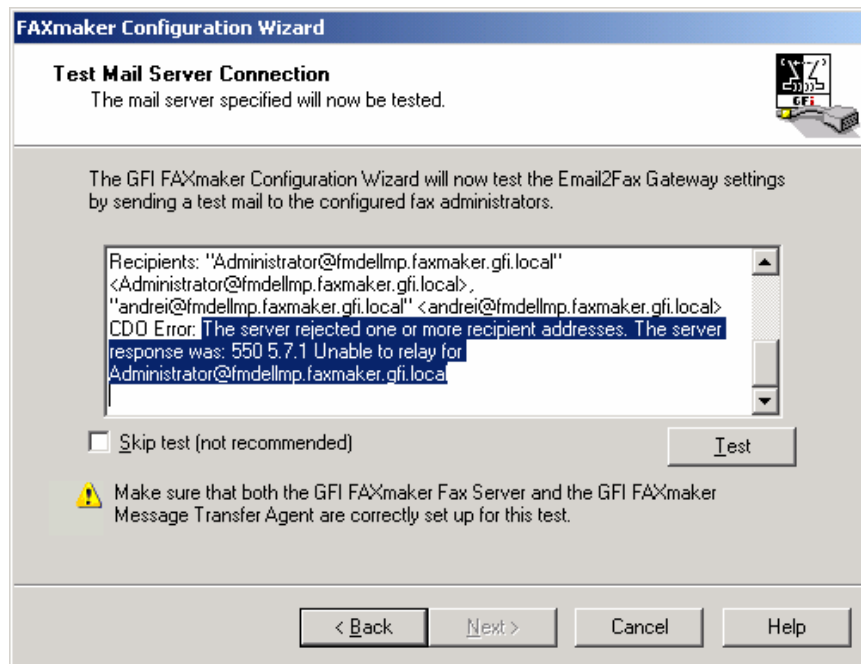
Screenshot 47 - The GFI FAXmaker configuration wizard will start the GFI FAXmaker services

After you have configured the fax lines and the GFI FAXmaker users, GFI FAXmaker will start the GFI FAXmaker fax service and the GFI FAXmaker MTA (Message transfer Agent). Click Next to continue.



Screenshot 48 - Testing your mail server connection – a successful test

The wizard will now test the mail server connection. It will attempt to send a mail via your mail server to the configured fax administrator. You will need to check if the mail actually arrived in the fax administrator mailbox. Whether the test was successful or not will be displayed in the dialog itself.



Screenshot 49 - Mail server test failed

If the test fails, the error condition will be displayed in the dialog. The screenshot shows an example error highlighted. The most common errors and their resolution are:

**CDO Error:** *"The transport failed to connect to the server."*

**Solution:** This error occurs if you specified that SSL has to be used but the server is not configured for use with SSL. Disable SSL or configure SSL on the mail server. This error also occurs if the IP address of the mail server has not been specified correctly, or the connection is being blocked by a firewall or by the mail server itself. Check firewall settings and check whether incoming connections from the FAXmaker server are allowed.

**CDO Error:** *"The server rejected one or more recipient addresses. The server response was: 550 5.7.1 Unable to relay for <email address>"*

**Solution:** The FAXmaker server connected, however when specifying the domain of the recipients address, the mail server refused it. Most frequently this occurs because relaying is not allowed from the FAXmaker server. Configure the SMTP server to accept relaying from the FAXmaker machine's IP or allow relaying for the internal email domain only. E.g. mycompany.com

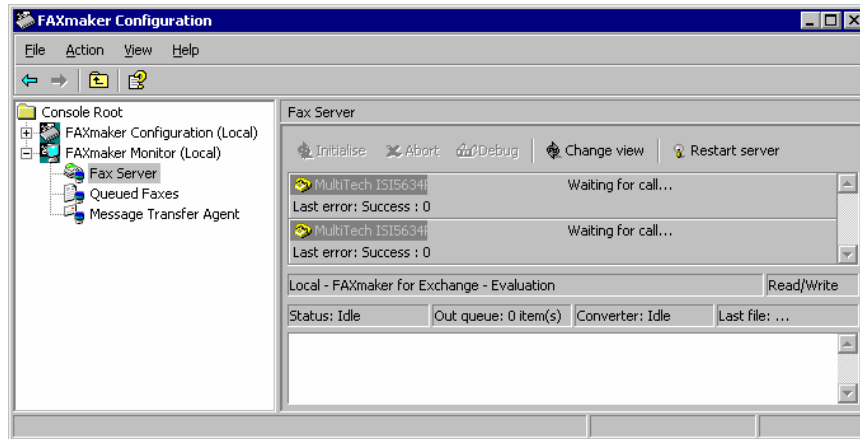
**CDO Error:** *"The server rejected the sender address. The server response was: 530 5.7.3 Client was not authenticated."*

**Solution:** Your mail server requires authentication and you have not entered the authentication details. Go back to the SMTP server configuration dialog by clicking the 'back' button in the FAXmaker Configuration Wizard and configure authentication details. You can also configure the SMTP server to accept anonymous SMTP connections (if the mail server is only available to the intranet).

**CDO Error:** *"The message could not be sent to the SMTP server. The transport error code was 0x80040217. The server response was not available"*

Solution: This error is normally encountered when the authentication details are invalid. Go back to the SMTP server configuration dialog by clicking the 'back' button in the FAXmaker Configuration Wizard and configure authentication details.

If the mail server test was successful, you can now check if the fax server is up and running from the GFI FAXmaker monitor node in the GFI FAXmaker configuration. Start up the GFI FAXmaker configuration and check the fax server status.



Screenshot 50 - GFI FAXmaker FAX Server monitor with services running

**NOTE:** You can configure GFI FAXmaker in more detail using the GFI FAXmaker configuration program.

👉 If you have not entered an administrator account or password the service will not start. Reconfigure the service user in the services control panel (under administrative tools) and attempt to restart the service.

### Step 5: After running the GFI FAXmaker wizard

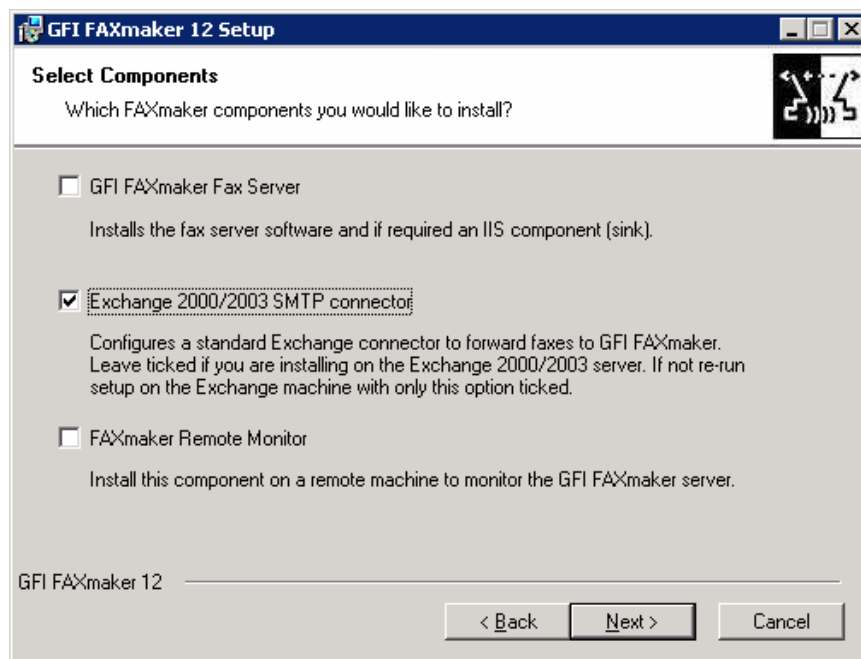
After you completed the GFI FAXmaker wizard and verified that the fax server is running.

- If you have installed GFI FAXmaker on a Microsoft Exchange 2000/2003 server machine, go to the chapter 'Installing the clients'.
- If you have not installed it on the Exchange Server 2000/2003 machine, you must go to the paragraph 'Installing the connector on a remote Exchange server machine'. After this you can proceed to install the clients.
- If you have an Exchange 5.5 server go to the chapter 'Configuring Exchange Server 5.5 for faxing'. After this you can proceed to install the clients.
- If you have Lotus Notes go to the chapter 'Configuring GFI FAXmaker for Lotus Notes'. After this you can proceed to install the clients.
- If you have a SMTP/POP3 server go to the chapter 'Configuring an SMTP/POP3 server for faxing'. After this you can proceed to install the clients.

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## Installing the connector on a remote Exchange server machine

If you have Exchange Server 2000 or 2003 and have not installed GFI FAXmaker on the Exchange server machine it self, then you must run the GFI FAXmaker installation again on the Exchange server machine. When you arrive at the dialog which asks which FAXmaker components to install, tick only the option 'Exchange 2000/2003 SMTP connector'.



Screenshot 51 - Installing only the Exchange connector

This will configure a standard Exchange 2000/2003 SMTP connector which forwards fax and sms messages to the GFI FAXmaker server.

If you prefer, you can manually create the connector. For a detailed description how to do this, go to the chapter: 'The Exchange 2000/2003 SMTP connector'.

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## Upgrading from earlier GFI FAXmaker versions

**Important note:** The default cover page format has changed from RTF to HTML. Therefore, after performing the upgrade, you have to re-design your RTF cover pages in HTML format. You will also have to reconfigure the cover page settings.

If you have an earlier version of GFI FAXmaker installed, and you want to retain your fax device and line settings, please perform the upgrade as follows:

1. Un-install your current GFI FAXmaker installation and make sure you DO NOT delete the directory where it was installed.
2. Run the GFI FAXmaker installation build and follow the instructions.
3. When set-up asks you for the installation directory, choose to install in the same directory where your old GFI FAXmaker installation was.

This procedure will make sure that you keep your fax server settings. I.e.: The lines and devices configuration, the dialing configuration etc... User configuration such as routing information and call blocking

are not retained. After the new installation has been successfully installed, you can continue to configure GFI FAXmaker.

Alternatively, you can install GFI FAXmaker to a new directory and configure GFI FAXmaker again. In this case however, fax device and line settings will not be retained

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## Entering your License key after installation

If you have purchased GFI FAXmaker, you can enter your License key in the General > Licensing node.

If you are evaluating GFI FAXmaker, it will time out after 60 days (with evaluation key). If you then decide to purchase GFI FAXmaker, you can just enter the License key here without having to re-install.

You must license GFI FAXmaker for the number of users that will send & receive faxes.

Entering the License key should not be confused with the process of registering your company details on our website. This is important, since it allows us to give you support and notify you of important product news. Register on:

<http://register.gfi.com>

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## Installing the OCR module

***NOTE: This paragraph is only applicable if you have purchased the OCR module.***

GFI FAXmaker users can opt to purchase an OCR module that can convert the fax to readable text. It can also be used to route faxes.

To install the OCR module:

1. Run **Setup.exe** from the OCR directory of your CD-ROM or from the directory you unzipped the downloaded file(s) to. You will be asked to close all programs. Click **Next**. The module will now be installed automatically.
2. Set-up OCR routing from the GFI FAXmaker configuration, OCR routing node.