

Installing GFI FAXmaker

System Requirements

Before you install GFI FAXmaker, please ensure that the following requirements are met.

GFI FAXmaker FAX Server:

- A Windows 2000, 2003 server machine with at least 256 Mbytes of RAM and an 1Ghz processor.

NOTE: For the Brooktrout SR140 FOIP solution the minimum specifications are 512 Mbytes of RAM and a 2.6Ghz 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>.

NOTE: For more information related to the installation of fax devices refer to the Fax Device installation manual available from the GFI website.

- If you are installing GFI FAXmaker on a separate machine other than the mail server, the IIS SMTP service is required. The IIS SMTP service is included in every Windows distribution. To verify the Installation of the SMTP Service: From: **Control Panel ► Add/Remove Programs ► Add/Remove Windows Components ► Internet Information Services (IIS) component ► Details**. Verify that the SMTP Service check box is selected. If not selected, click to select it, click **OK**, and 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 GFI FAXmaker 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 you are using Microsoft Exchange Server 2007, ensure that Hub Transport role and Microsoft Messaging API and Collaboration Data Objects version 1.2.1 are installed.
- If using Windows 2000, ensure you have Service Pack 3 or later installed.
- Disable Anti Virus software from scanning the GFI FAXmaker & other relevant directories both during installation and GFI FAXmaker operation. 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.

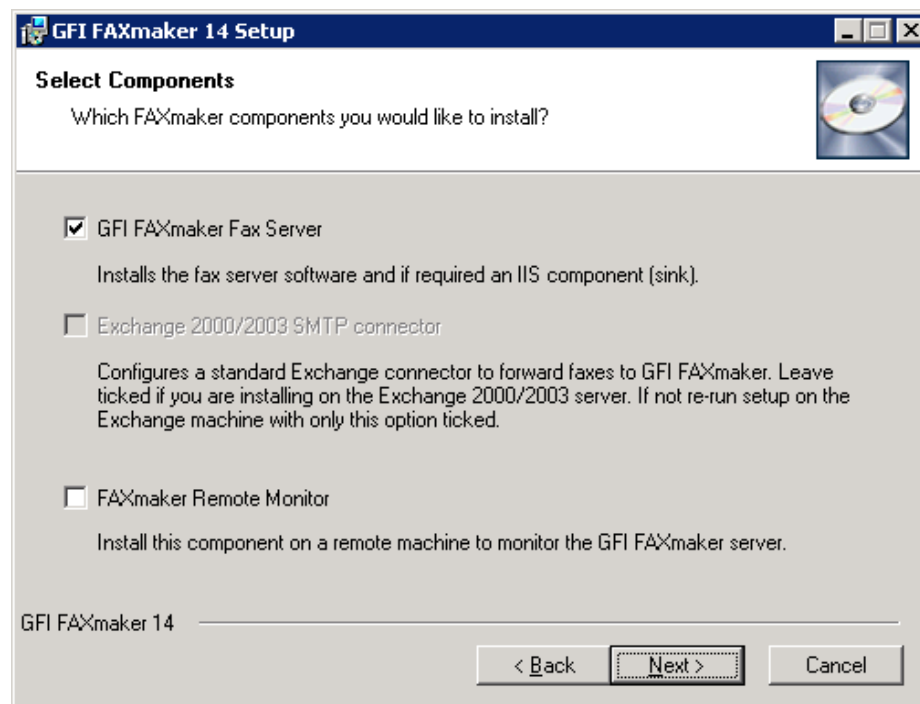
GFI FAXmaker client:

- Windows Vista/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.

Installing the GFI FAXmaker server software

NOTE: Before installing GFI FAXmaker, ensure that you are logged on as Administrator and that all the other Windows application are closed.

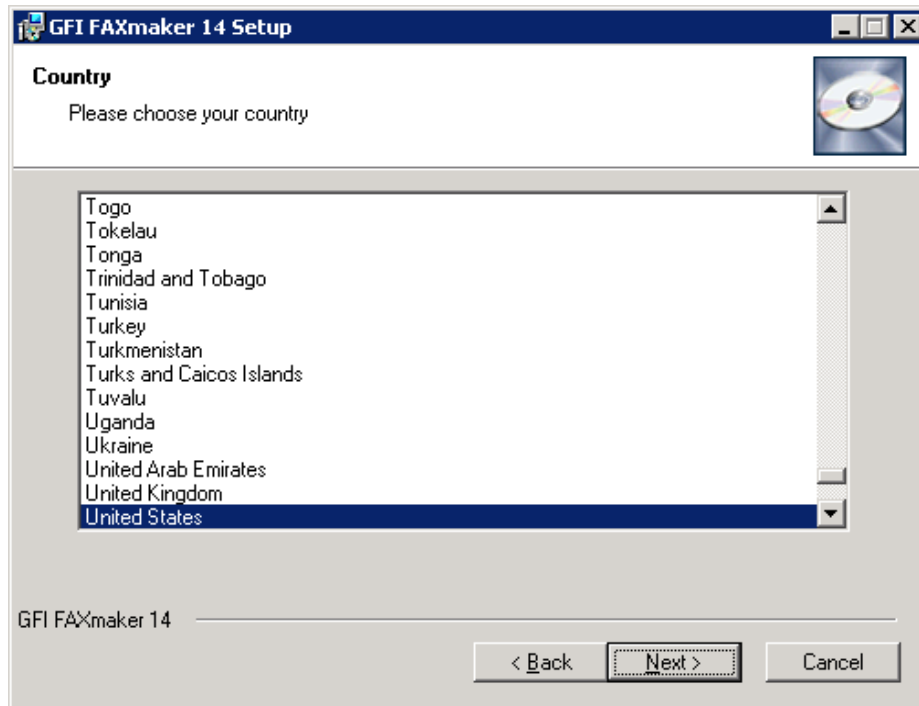
1. Run GFI FAXmaker set-up by double-clicking on the installation file. Click **Next** to start installation.
2. Select the language in which you want GFI FAXmaker to install and click **OK**. A welcome dialog will appear. Click **Next** to continue setup.
3. In the License agreement dialog box, review 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 5 - Selecting what components to install

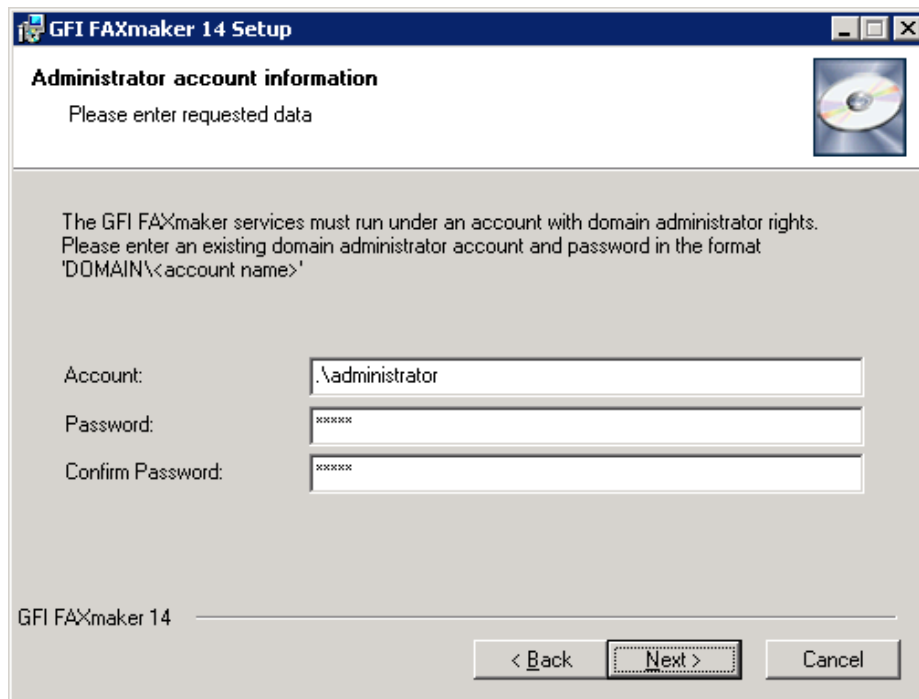
5. Set-up will ask you which components you want to install. If you are installing GFI FAXmaker on the Exchange 2000/2003/2007 server machine, you will need to tick both the GFI FAXmaker Fax server component and the Exchange 2000/2003 SMTP connector

component. If you are installing it on a separate machine, or are not using Exchange 2000/2003/2007 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 6 - Selecting your country

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



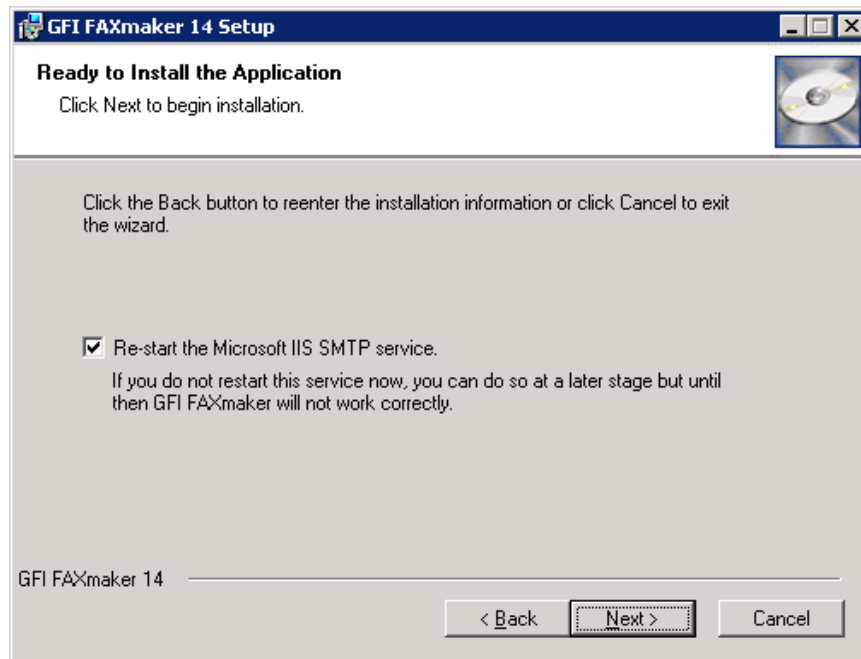
Screenshot 7 - Account name for services

7. Provide an administrator account and password to install the GFI FAXmaker services.

NOTE: 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**.

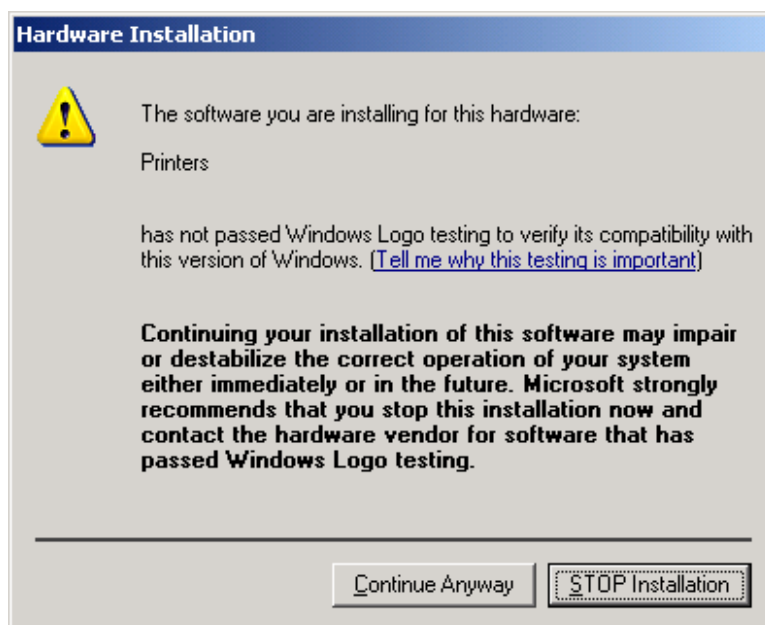
NOTE: GFI FAXmaker will need approximately 40 MB of free hard disk space. In addition to this you must reserve approximately 200-300 MB for fax data storage during operation. The actual disk space used depends on the quantity of faxes being sent.



Screenshot 8 - 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 9 - Confirm printer driver installation

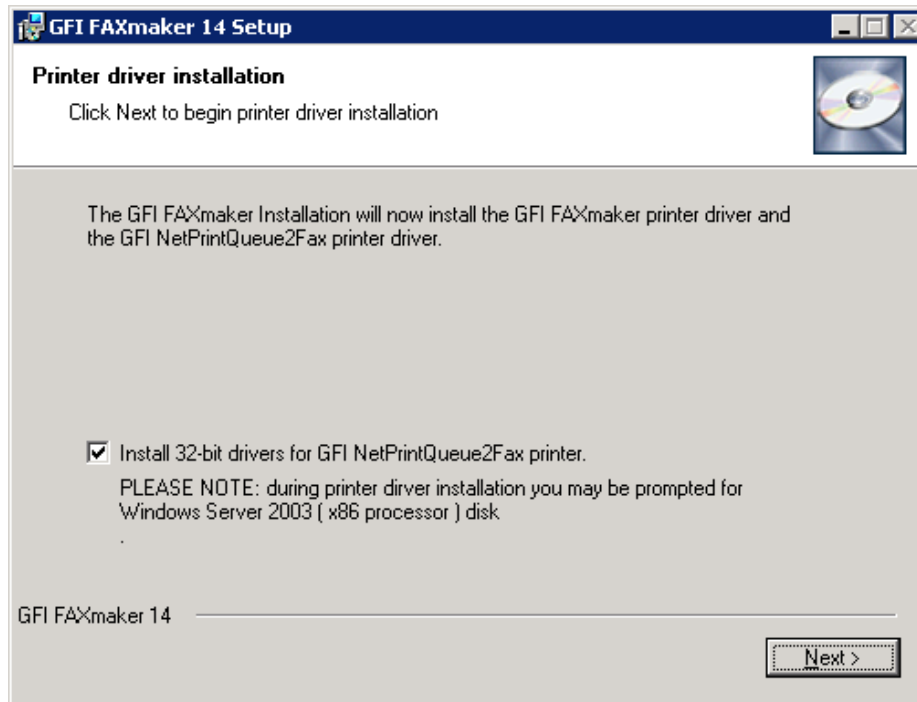
11. Windows will confirm installation of uncertified drivers (Almost no vendors certify them because it's a very time intensive and bureaucratic process). Click **Continue Anyway** to proceed.

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.

Installing the GFI FAXmaker server software on 64bit computers

Installing GFI FAXmaker on x64 systems installs the NetPrintQueue2FAX printer driver for 64bit operating systems. In this case, for 32bit clients to use the NetPrintQueue2Fax driver the 32bit version of the same drivers must be also stored on the 64bit machine. The 32bit clients will then be able to retrieve the 32bit drivers from the 64bit machine on their first use of the NetPrintQueue2FAX printer driver.

1. To install GFI FAXmaker 14 on x64 systems, follow the installation procedure specified in the 'Installing the GFI FAXmaker server software' section in this chapter.



Screenshot 10 - Installing printer drivers for 32 bit computers on a 64 bit server

2. When prompted select whether you want to install also the 32bit version of the GFI NetPrintQueue2FAX printer driver for faxing through 32 bit machines.

3. Click **Next** to continue.

NOTE 1: During 32bit driver installation, GFI FAXmaker will prompt you to insert the Microsoft Windows Server 2003 CD (32bit version). This is required to install 32bit Windows Kernel Drivers.

NOTE 2: If Windows Server 2003 CD is not available, unselect the 'Install 32-bit drivers for GFI NetPrintQueue2FAX' option. GFI FAXmaker will automatically copy the GFI NetPrintQueue2FAX 32bit drivers in "*<product_folder>\NetPrintQueue2Fax_Drivers*" for future use.

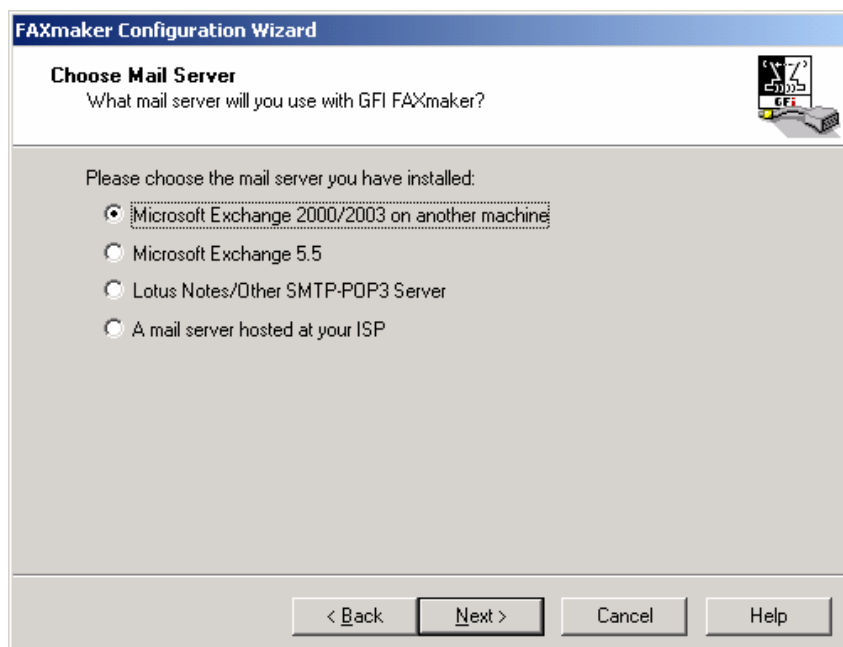
Running the GFI FAXmaker configuration wizard



Screenshot 11 - The GFI FAXmaker configuration wizard

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

Step 1: Choosing your mail server



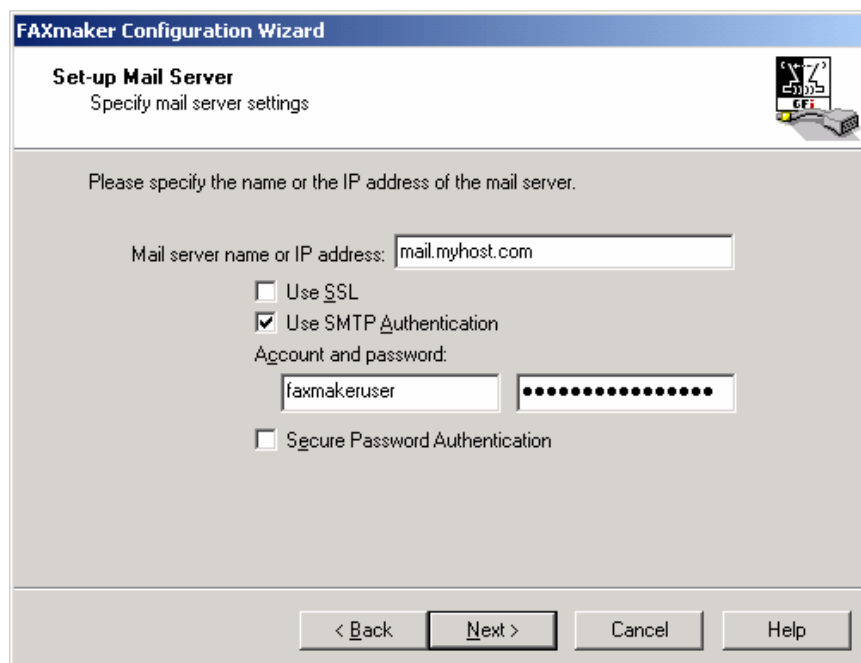
Screenshot 12 - Choose your mail server

Unless you are installing GFI FAXmaker on an Exchange 2000/2003/2007 server, the wizard will prompt you what type of mail server you are using. If you select:

- Microsoft Exchange 2000/2003/2007 on another machine or Microsoft Exchange 5.5, the wizard will prompt you for the **IP address** of the Exchange server machine name.

NOTE: The IP address is required since the 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 emails, also provide 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.



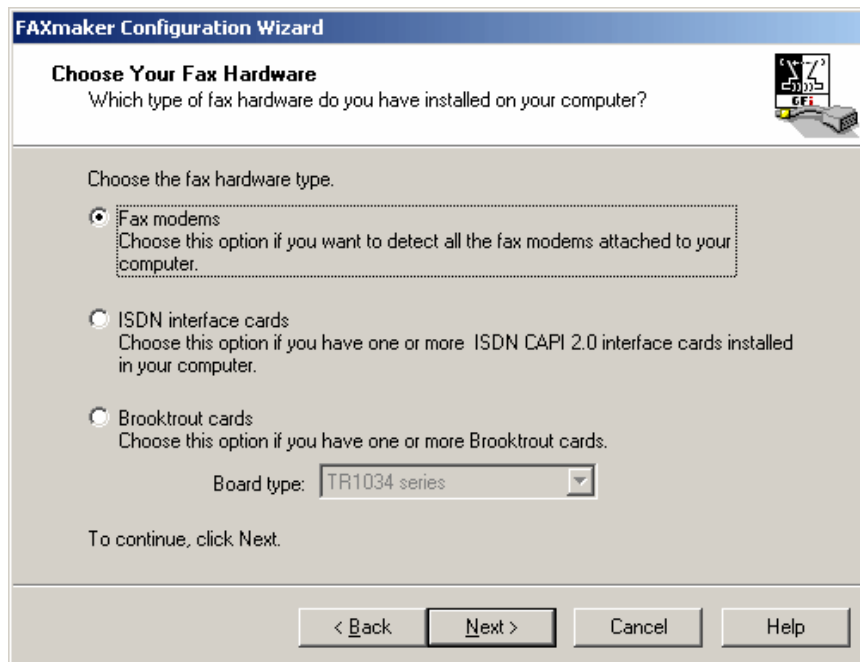
Screenshot 13 - The wizard will prompt you for a mail server name

After you have configured the mail server, click **Next**. The wizard will connect to the specified mail server to ensure the mailservr responds at the IP address provided

NOTE: Authentication settings are only tested at the end.

For more information how GFI FAXmaker integrates with each type of mail server, refer to 'How to deploy GFI FAXmaker for Exchange/SMTP' chapter.

Step 2: Configuring the fax devices

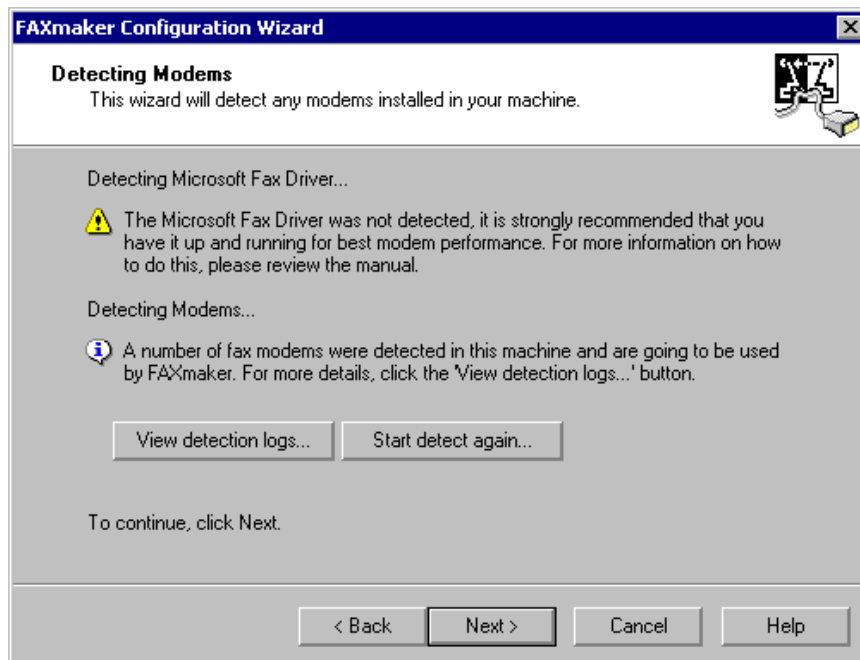


Screenshot 14 - Selecting the type of fax hardware to be used with GFI FAXmaker

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

If you use Fax modems:

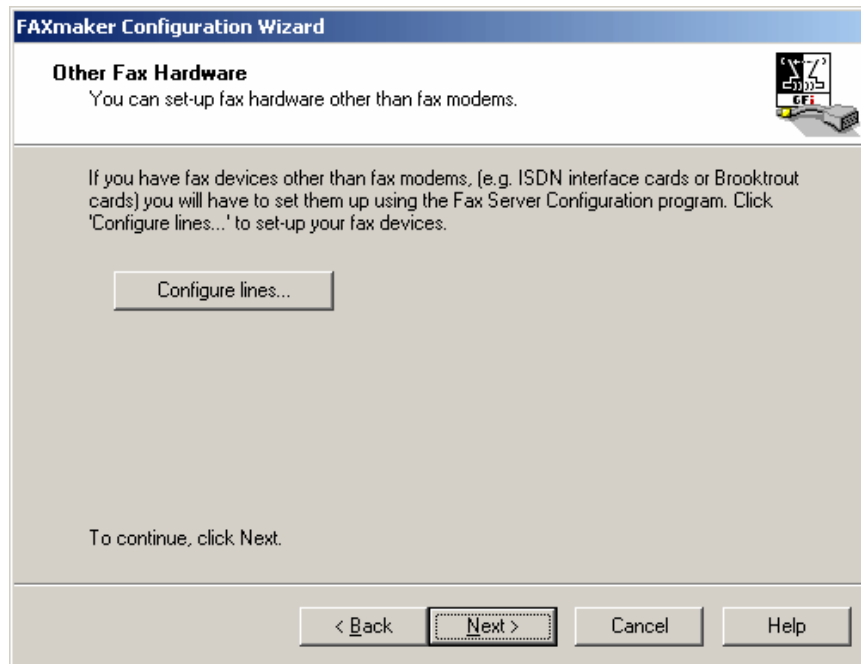
GFI FAXmaker will attempt to detect modems already installed on your machine. GFI FAXmaker will first try to detect any Microsoft Fax drivers that are installed.



Screenshot 15 - 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 16 - 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.

NOTE: This can be changed but you at this point you must specify at least one fax user.

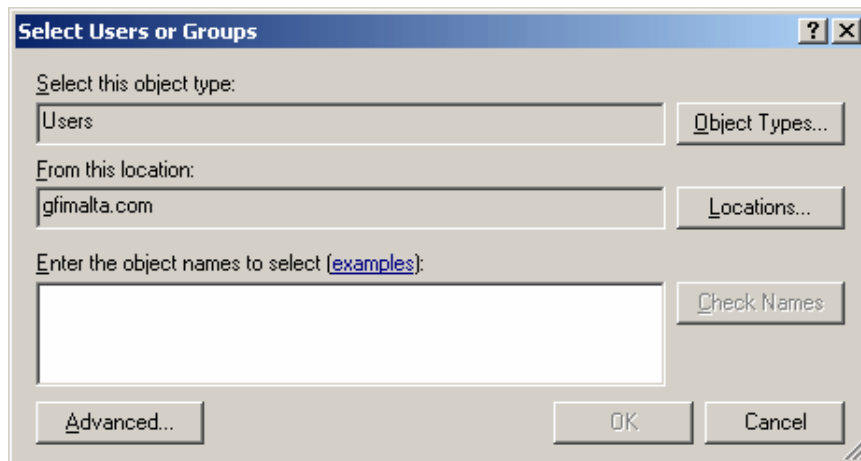
GFI FAXmaker is licensed based on the number of users that receive or send faxes. The procedure is different depending on whether you have Active Directory or not:

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), GFI FAXmaker will connect to Active Directory and allow you to specify GFI FAXmaker users and user based rules. This is done by selecting users from Active Directory.

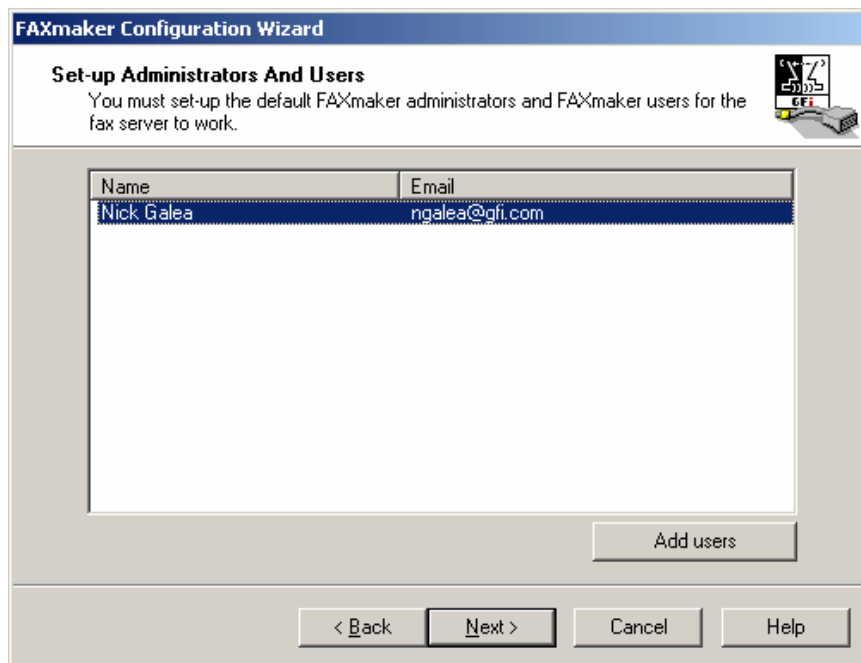
GFI FAXmaker relies on the email address specified for each user in active directory. If you use Microsoft Exchange 2000/2003/2007, or any Active Directory integrated mail server (including Windows 2003 POP services) this email address is automatically filled in correctly.

NOTE: If you use Exchange 5.5 or a non active directory integrated mail server, you are required to provide 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 17 - Selecting administrator and users from Active Directory

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



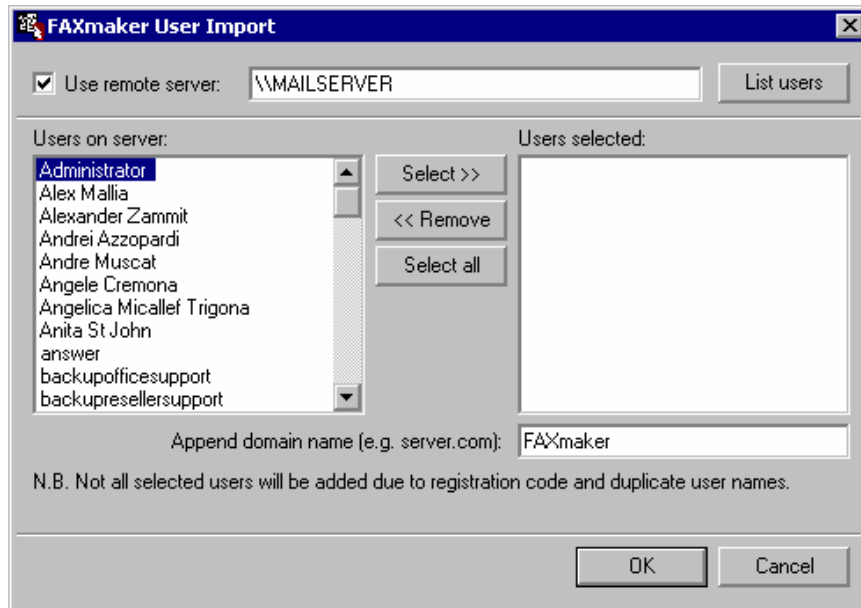
Screenshot 18 - Specifying users

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 2000 Server or higher (therefore no 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.

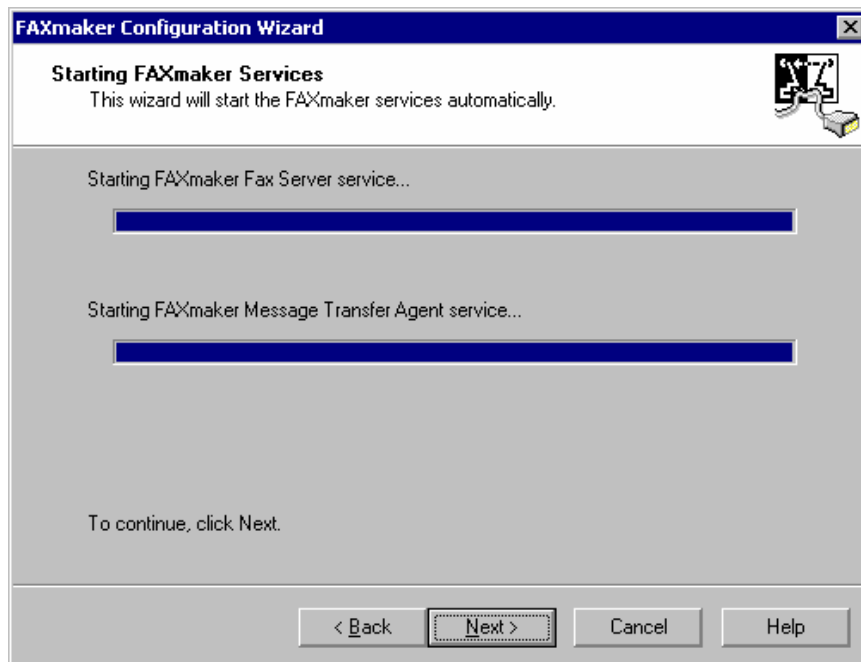


Screenshot 19 - Importing GFI FAXmaker users from Windows NT or local user database

2. All retrieved users will be listed in the 'Users on server list'. Select which users can use GFI FAXmaker and click on the **Select** button.
3. GFI FAXmaker requires 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.

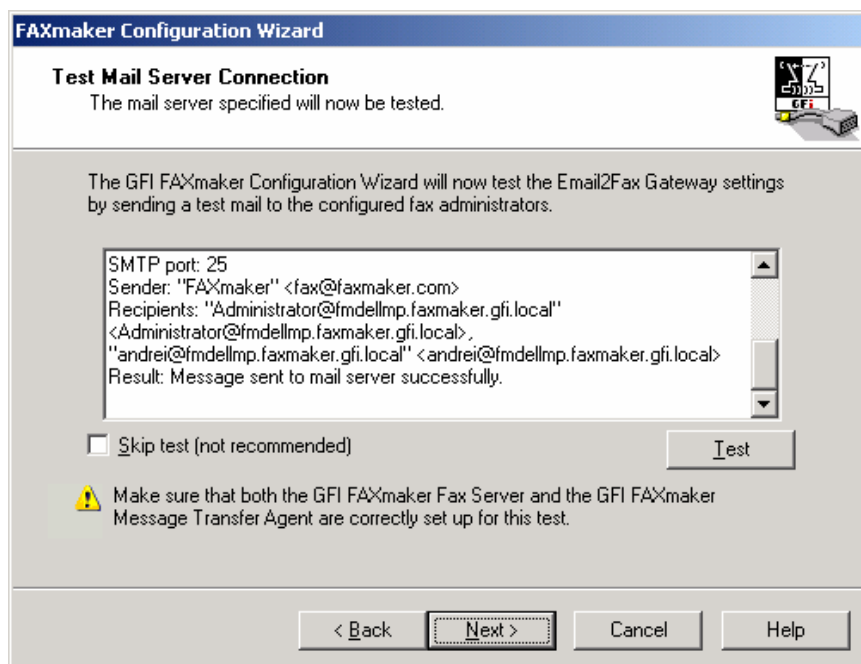
NOTE: GFI FAXmaker will automatically configure default settings for each user.

Step 4: Test the mail server connection and start services



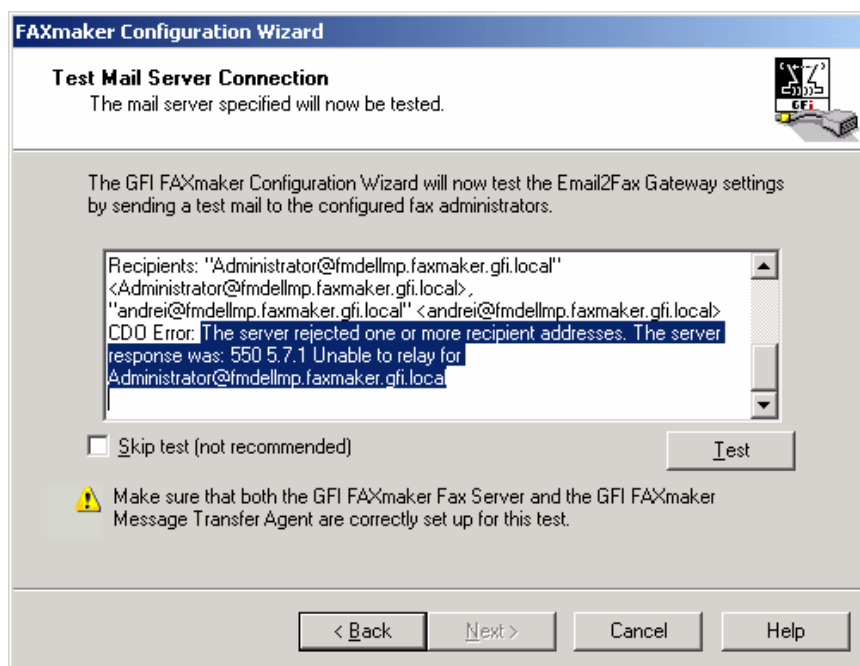
Screenshot 20 - The GFI FAXmaker configuration wizard will start the GFI FAXmaker services

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 21 - Testing your mail server connection – a successful test

The wizard will now test the mail server connection. It attempts 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. The test's success or failure is displayed in the dialog box.



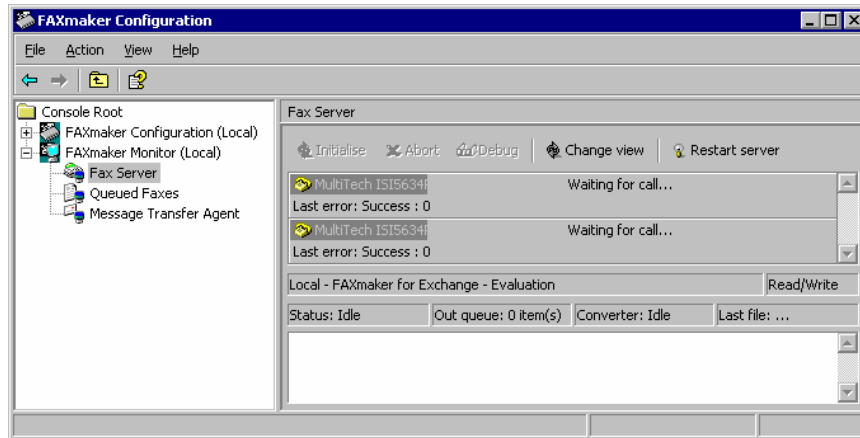
Screenshot 22 - Mail server test failed

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:** SSL has to be used but the server is not configured for use with SSL. Disable SSL or configure SSL on the mail server. Also occurs if the IP address of the mail server has not been configured correctly, the connection is being blocked by a firewall or by the mail server. Check firewall settings and if incoming connections from the GFI 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:** Mail server refused the domain of the recipients address following a successful GFI FAXmaker server connection. Occurs because relaying is not allowed from the GFI FAXmaker server. Configure the SMTP server to accept relaying from the GFI FAXmaker machine's IP or allow relaying for the internal email domain only.
- **CDO Error:** *“The server rejected the sender address. The server response was: 530 5.7.3 Client was not authenticated.”*
 - **Solution:** Authentication details missing. Configure authentication details from the SMTP server configuration dialog in the GFI FAXmaker Configuration Wizard. 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:** Authentication details invalid. Configure authentication details from the SMTP server configuration dialog in the GFI FAXmaker Configuration Wizard.

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 23 - GFI FAXmaker FAX Server monitor with services running

NOTE 1: You can configure GFI FAXmaker in more detail using the GFI FAXmaker configuration program.

NOTE 2: If an administrator account or password is not provided 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:

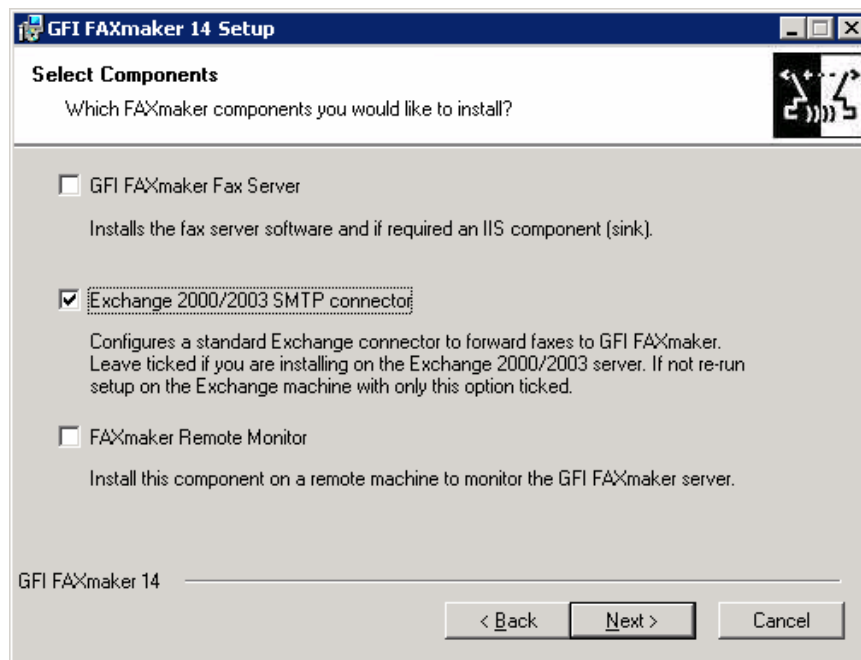
- If you have installed GFI FAXmaker on a Microsoft Exchange 2000/2003/2007 server machine, go to the chapter ‘Installing the clients’.
- If you have not installed it on the Exchange Server 2000/2003/2007 machine, you must go to the paragraph ‘Installing the connector on a remote Exchange server machine’. 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.

Installing the connector on a remote Exchange server machine

If you are running Exchange Server 2000 or 2003 but opted to install and run GFI FAXmaker on another machine, then you must also launch the GFI FAXmaker installation on your Exchange server machine. This is required to automatically create a 'sink' and an 'SMTP' connector through which fax requests will be relayed to GFI FAXmaker.

When GFI FAXmaker installation is launched on the Exchange server, you will be prompted to specify which GFI FAXmaker components to install. Select only the option 'Exchange 2000/2003 SMTP connector'.



Screenshot 24 - Installing only the Exchange connector

NOTE: You can also opt to manually create the connector instead of launching GFI FAXMaker setup on Exchange server. For a detailed description of how to do this, refer to 'The Exchange 2000/2003 SMTP connector' chapter.

Upgrading from earlier GFI FAXmaker versions

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. Uninstall your current GFI FAXmaker installation and make sure you do **NOT** delete the directory where it was installed.
2. Run the new GFI FAXmaker installation 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 retains your fax server settings. I.e.: The lines and devices configuration, the dialing configuration etc... User configuration such as routing information and call blocking is also retained. After the new installation has been successfully installed, you can continue to configure GFI FAXmaker.

NOTE 1: 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.

NOTE 2: Ensure that the cover page format in HTML. Any RTF cover pages must be re-designed in HTML format to be used with GFI FAXmaker.

Entering your License key after installation

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

GFI FAXmaker's evaluation version expires after 60 days. If a new GFI FAXmaker license is obtained, you can just enter the new License key here without any re-installation.

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>

Installing the OCR module

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

GFI FAXmaker users can opt to install 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.