

# *Cleo* Stream<sup>®</sup>

## **System Administrator Guide**

Version 7.6



March 2026

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# 1

## Introducing Cleo Stream®

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Cleo Stream® is a Microsoft Windows-based fax processing platform that provides a complete range of advanced voice, fax, email, and SMS capabilities, including:

- **Fax/email integration** - allows you to send a fax via email using Microsoft Exchange, Lotus Notes, GroupWise and any SMTP-compliant email system.
- **Broadcast messages** – allows you to send voice, email, SMS and fax broadcast to multiple destinations, for example, appointment reminders.
- **Fax from print driver** – allows you to send a document to a fax destination as if you were sending it to a printer.
- **Support for faxing from MFPs** – allows you to use Cleo Stream to process faxes originating from Multi Function Printers (MFPs).

System monitoring and operation are handled centrally, from anywhere on the network, using the Cleo Stream graphical user interface.

## Cleo Technical Support

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Standard Cleo Technical Support is available from 8am - 5pm CST, Monday through Friday. Support availability might differ depending on your support package.

Training and a support subscription are required to work with a Cleo technical support analyst for all products, except Cleo LexiCom.

When contacting the Cleo support team, have your contact information, the name of product you are calling about, and your serial number, if available. During the support process we may request additional information (for example, a support bundle) that will vary depending on the type of request or issue.

Requests are handled on a callback basis in the order they are received. The Cleo support answering service or web form will collect your information and your request will be placed in our callback queue.

To contact Cleo Technical Support:

- Use the request form at: <http://www.cleo.com/support/request.php>.
- Call us:
  - 1-815-282-7894
  - US (toll free): 1-866-444-CLEO(2536)
  - UK: 02038653439



# 2

## Setting up users

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A user is a person who can send faxes through Cleo Stream. You use the **User Manager** page to create, modify, and delete users. An MFP is a device a user might use in conjunction with the Cleo Stream system to send or receive a fax. In addition, you can synchronize your list of users with your LDAP directory.

### Add a user

---

Only users with an Administrator role can add users.

1. If necessary, log in as an user with an `Admin` role.
2. Click the **Admin** link to toggle to the admin-only portion of Cleo Stream.
3. Click **User Manager > User > Add**.  
The **Manage Profile** page displays.
4. Enter information about the user in the **Settings** and **Preferences** sub-pages, and then click **Save**.  
See [About user information](#) on page 7 for information about the user information you enter.
5. Close the **Manage Profile** page.

### About user information

When you add or update a user, you modify the values on the **Manage Profile** page. The **Manage Profile** page consists of two sub-pages: **Settings** and **Preferences**.



**Note:** When updating users added to the system through the LDAP synchronization, some fields might be disabled and some choices might be limited.

#### Settings

The Settings page contains fields where you specify basic user information.

##### First Name

##### Last Name

##### Email

##### Password

Basic user information. All required fields.

##### User ID

The dial-in ID for the AC-Record feature within Stream Notify.

##### PIN

The User ID PIN is used for AC-Record's dial-in password, and SecurePDF's password.

**Fax****Other Fax**

Fax number associated with the user. This number appears on the header of sent faxes. Faxes sent to these numbers are delivered to this user.

**Company**

The company to which the user belongs. The value you specify in this field has a potential impact on various options for sent faxes (for example, cover page and opt out number) and various options used for sent voice messages (for example, pre- and post-messages).

**Department**

A department within a company to which the user belongs. The value you specify in this field has a potential impact on various options for sent faxes (for example, cover page and opt out number) and various options used for sent voice messages (for example, pre- and post-messages).

**Billing Code**

Used as the value for the billing code tag in a cover page.

**Document Management**

Select the check box and enter a path to deliver this user's faxes to the path.

Leave the check box unchecked to deliver this user's faxes to the user's email address.

**Active**

Select **Active** to enable the user to access Stream Notify and to receive faxes.

Select **Inactive** to disable the user.

**Sync State**

This setting is display-only and cannot be changed.

- When `True`, the user is configured via LDAP. This might restrict which configuration options are available within Stream Notify for this user.
- When `False`, the user is not configured via LDAP. All configuration options are available within Stream Notify for this user.

**Role**

A *role* is based on a combination of permissions that allow a user to perform a set of activities. Roles available include:

- **User** - Can view and edit Recipients, launch broadcasts, configure their user account, and view reports.
- **System Executive** - Can view reports for all users, but cannot launch broadcasts or view or edit Recipients.
- **Denied** - Cannot access Stream Notify. This is commonly used for desktop faxing users.
- **Company Executive** - Can view reports for their company, but cannot launch broadcasts or view or edit Recipients.
- **Company Administrator** - Can view and edit Recipients, launch broadcasts, manage user accounts within their company, and view reports for all users in their company.

If the `MultiCompanyAdmin Master Configuration` option is set to 1 and you select the **Company Administrator** role, the **Companies** field displays, where you can choose one or more companies for which this user will be an administrator.

- **Administrator** - Can view and edit Recipients, launch broadcasts, manage user accounts, view reports for all users, and make system-wide configuration changes.

## Companies

This field is only displayed when the `MultiCompanyAdmin` Master Configuration option is set to 1 and you select **Company Administrator** in the **Role** field. Use this field to select one or more companies for which this user will be an administrator.

## Preferences

Use the **Preferences** page to specify some default values for the user with respect to the application and how it works.

### Fax Format

Specify the format this user's faxes will be delivered in.

- **TIF** - Faxes are delivered as TIFF images.
- **PDF** - Faxes are delivered as PDF files.
- **TIF & PDF** - Faxes are delivered as both TIFF and PDF images.
- **SecurePDF** - Faxes are delivered as PDF files that are password-protected. The password is the User ID PIN.
  - The recipient receives an email with the secure PDF fax attached to it.
  - The confirmation email received by the sender will show either the cover or first page of fax.
  - The Outbox web link to the secure PDF fax is available to the sending user and Stroom Notify administrators. Note that User ID PIN is not required to view the secure PDF fax from the Outbox web link.
- **WebViewPDF** - Faxes are delivered as a link that will require the user to log into Stroom Notify. Not valid when Document Management is checked.
- **My Fax Release** – Faxes are held, and can be released by printing with the Stroom secure faxing application on a Xerox MFP.

### Default App

Select the application the user logs into by default. Leave this to blank to log the user into the Reports-Status page. Select Stroom Alert to log the user into the Stroom Notify page.

### Confirmation

Indicate when to generate and send confirmation messages.

- **None** - never send confirmation.
- **All** - always send confirmation.
- **On Failure Only** - send confirmation only when sending a fax fails.
- **On Success Only** - send confirmation only when sending a fax is successful.

### No Cover page

Select this check box to indicate the user will not use a cover page by default.

If you leave the check box empty, click **Choose File** to browse to the file you want to use as the default cover page.


### Allow Fax

Select **Yes** to enable this user to send faxes.

Select **No** to disable this user to send faxes.

See [Enabling fax access security for a Cleo Stroom user](#) on page 17.

 **Note:** This field is only available when the **ClientAccessSupport** setting on the System Settings page is set to 1. See [Enabling fax access security at the server level](#) on page 17.

 **Note:** You must also enable faxing at the client level. See [Enabling fax access security for your email client](#) on page 18, [Enabling fax access security for the Cleo Stream Print client](#) on page 18, and [Enabling fax access security for the MFP client](#) on page 17.

### Default MFP App

Select the Cleo application you want the user to log into on their MFP by default. Choose from the following:

- **None** - User must choose which Cleo application to use when logging into the MFP.
- **Cleo Stream** - Cleo faxing application.
- **Cleo Unify** - Cleo secure collaboration application.
- **Cleo Trust** - Cleo secure messaging application.

## About roles and permissions

You can assign roles to users to your Cleo Stream.

In the Cleo Stream software, you assign permissions through the use of roles. Roles are sets of permissions bundled together to make it easier to enable users to do their jobs. The following is a summary of roles you can assign to users .

Role	Role Code	Description
System Administrator	1	Can manage all Company User Pages.
User	2	Can send broadcasts and see only their own page.
Company Administrator	3	Can manage User Pages for only their own company by default, or for multiple companies if the Master Configuration option, <code>MultiCompanyAdmin</code> , is set to 1.
Company Executive	4	Can only view reports from their own company.
System Executive	5	Can only view reports, but from all companies.
Denied	0	User has no permission to use the system at all.

## Searching the user list

1. If necessary, log in as an user with an `Admin` role.
2. Click the **Admin** toggle to the admin-only portion of the Cleo Stream server.
3. Click **User Manager > Users > Search**.  
The **Search Users** page is displayed.
4. Enter values in the fields on which you want to base your search and then click **Search**.

A list of users matching the criteria you entered is displayed.

5. Do any of the following:

- Click on one of the users listed to display the **Manage Profile** page containing information for that user.
- Click **Manage** for one of the users listed to display lists of recipients and distribution lists owned by that user.
- Click the check box for one or more users and click **Remove** to delete the selected users. Users synchronized with LDAP do not have an associated check box as they cannot be removed from the list of users.



**Note:** The **Active** check box is informational only.

## About LDAP configuration

Cleo Stroom allows you to synchronize your list of Cleo Stroom users with one or more LDAP directories, such as Microsoft Active Directory, Novell eDirectory, or Lotus Domino Directory. The synchronization process is scheduled through some Cleo Stroom workflow.

### Synchronizing your Cleo Stroom users with your LDAP directory

You can configure Cleo Stroom to synchronize your Cleo Stroom user list with an LDAP source, such as Active Directory or Lotus. For Microsoft environments, you can also use LDAP (domain) authentication.

You use the **LDAP User Sync** page to configure your sync settings. To get to this page, click **Admin > System Manager > Configuration > LDAP User Sync**.

The initial page shown for LDAP User Sync allows you to search for existing synchronizations by name or add a new synchronization. When searching, leave the field blank and click **Search** to return all available records. From here, you can delete or edit an existing synchronization (if you created it).

After you click **Add Domain to be Synced**, or select an LDAP Sync name link to edit, you specify LDAP attribute values to create a new synchronization or edit an existing synchronization.

### LDAP Synchronization Administration attributes

These attributes allow you to specify LDAP synchronization parameters once and use them repeatedly.

LDAP attribute	Description
Sync Name	The name used to identify this synchronization.
Mail System	The mail system used in conjunction with Cleo Stroom. Exchange systems add the ability to specify the user name and password to connect with Active Directory if needed. It also enables you to take advantage of domain authentication for synchronized users instead of the built-in Cleo Stroom authentication.
LDAP Server IP Address	The IP address of the LDAP server to synchronize with.
LDAP Port	The port that the LDAP server uses to field requests. The default is 389.
LDAP User Class	The LDAP class name for Users. The default is <i>Person</i> .

LDAP attribute	Description
Load Users	This selection filters the users that will be synchronized. Choices are All Users, Users with a Fax number, or Users with Additional fax numbers.
LDAP Company Field	The optional LDAP server field to sync as Company.
LDAP Department Field	The optional LDAP server field to sync as Department.
LDAP OU	The optional LDAP server organizational unit to sync.
LDAP Username	This is specific to Microsoft systems.. The <code>username@domainname</code> for connecting to Active Directory (Optional). <code>domainname</code> is the fully qualified domain name.
LDAP Password	The password to be used with the LDAP username. Required only if LDAP Username is specified.
Admin Email	Email address where certain sync errors can be emailed.
Fax Format	Select the default format for inbound faxes.
Default User Role	Select the default role for newly synchronized users.
Use LDAP Authentication	Applicable only to Microsoft environments. Select this check box to set all synchronized users to authenticate against Active Directory instead of using Cleo Stream authentication.
Internal Domain	This is specific to Microsoft systems and is the fully qualified domain name that is appended to the username when using LDAP authentication, for example, <code>internal.stream.net</code> . Required if using LDAP authentication.
Do Not Mark Inactive Users	<ul style="list-style-type: none"> <li>• Checked – Matching users that are Inactive in Stream are not synced.</li> <li>• Unchecked – All matching users are synced.</li> </ul>
Allow Fax	<p>Sets <b>Allow Fax</b> in the user’s Preferences.</p> <ul style="list-style-type: none"> <li>• Yes - Synced user can send faxes.</li> <li>• No - Synced users cannot send faxes.</li> </ul>

## About cover page templates

You can create and store cover page templates for Cleo Stream users to use when they send faxes.

A cover page template is a rich text format (`.rtf`) document. Most word processing applications allow you to save `.rtf`. Because `.rtf` format preserves document formatting elements, the template can include any features that are available with your word processor, such as graphics, a variety of fonts, and formatted text.

Cover page use varies between Cleo Stroom applications. See *Using cover pages in Cleo Stroom Print* on page 14, *Using cover pages in Cleo Stroom Notify* on page 14, and *Using cover pages when you send a fax from your email client* on page 15.

## Creating a cover page template

Use a word processor or text editor to create an .rtf file to use as a cover page template.

When you create a cover page template, you specify where you want to place variable cover page information, such as the TO name, the SUBJECT, and the FROM name, by including a code, like a mail merge field name. When you use the cover page in a broadcast, Cleo Stroom replaces the codes with the appropriate information drawn from system parameters and from broadcast options you have specified. The codes themselves are not shown on the faxed cover page.

Use the following codes when you create a template document. All of these codes are optional, though typically the recipient's name and the date are always included. Be sure to type the curly braces, { }, around each code.

- {Attention} - Replaced with the recipient's name, commonly referred to as the TO name.
- {BillingInfo} - Optional "Billing code" that can be set by the user
- {Date} - Replaced by the current system date, in the following style associated with the time/date information associated of the Cleo Stroom computer.
- {FaxNumber} - Replaced by the destination fax number.
- {From} - Replaced by the fax sender's name. Be aware that this may be expanded to several lines of text.
- {FromFax} - The value set in the Fax field of the user's profile on Cleo Stroom Center
- {JobNumber} - A unique number assigned by Cleo Stroom Center to each Cleo Stroom job
- {Location} - The value set in the "Department" field of the user's profile on Cleo Stroom Center
- {Notes} or {Note} - Replaced by notes you want to include on the cover page.
- {Pages} - Total pages including one for the cover page.
- {Subject} - Replaced by the subject of the fax.
- {Time} - Replaced by the current system time in 24-hour clock style, for example: 17:35.

### Cover page template design tips

Here are some things to keep in mind as you work with your cover page template.

- To replace the default cover page template, replace the file, \StroomCenter\Documents\defaultcover.rtf.
- Some parameters such as {Attention} and {Notes} can be replaced by several lines of text, depending on how you specified this information when preparing the fax.
- Leave enough room for the amount of information you want to include on the cover page. Any text below the information already filled in will be moved down the page.

If the layout of the template is simple and there is plenty of room at the bottom of the page, this might be acceptable. If not, the parameter codes can be placed within text boxes, called *constrained text boxes* with some word processors. Text boxes are usually available from the word processor's drawing menu, and they can be made invisible with many word processors. By putting a code in a constrained text box, the associated information will be limited to that amount of text that can fit in the box. Some of the text might be cut off, but the page layout will remain intact.

- Send a test fax to yourself to review your cover page formatting.

## Specifying a default cover page

You can specify a default cover page on several levels: user, company, department, system.

Default cover pages work for Cleo Stroom Notify, Cleo Stroom Print, and sending a fax from your email client or through the CAP interface. Specifying a default for a Department is valid only for sending a fax from your email client or the CAP interface.

### Specifying a default personal cover page for a Cleo Stroom Notify user

1. If necessary, log in to Cleo Stroom as a user with an `Admin` role.
2. Click the **Admin** toggle to the admin-only portion of Cleo Stroom.
3. Click **User Manager > Users > Search**.  
The **Search Users** page is displayed.
4. Enter values in the fields on which you want to base your search and then click **Search**.  
A list of users matching the criteria you entered is displayed.
5. Click the name of a user to display the **Manage Profile** dialog box for that user and then click **Preferences**.
6. Click **Browse** to browse to the file you want to use as the default cover page.  
Select **No Cover page** to indicate the user will not use a cover page by default.
7. Click **Save**.

### Specifying a default cover page for a Cleo Stroom Notify company

1. If necessary, log in to Cleo Stroom as a user with an `Admin` role.
2. Click the **Admin** toggle to the admin-only portion of Cleo Stroom.
3. Click **User Manager > System > Cover Pages**.
4. Browse for and select a **Company Cover** page template.
5. Select a **Company** from the **Company** drop-down menu.
6. Click **Add/Update**.

## Using cover pages in Cleo Stroom Notify

When you send a fax using the Cleo Stroom Notify application, Cleo Stroom searches for the cover page template in the following order:

- a personal user cover page or no cover page
- a company cover page
- the system default cover page

## Using cover pages in Cleo Stroom Print

By default, the Cleo Stroom Print application uses the Cleo Stroom system cover page template located here:  
`\StroomCenter\Documents\defaultcover.rtf`.

From within Stroom Print you can optionally:

- add additional cover pages
- select from any of the cover pages you have added
- select a default cover page

## Using cover pages when you send a fax from your email client

When you use a cover page template as part of a fax you send from your email client, Cleo Stroom searches for the cover page template in the following locations in the following order:

- an attachment with a filename prefix of `_SCCP_`
- a personal cover page
- a department cover page
- a company cover page
- the system default cover page

The default cover page template is `\StroomCenter\Documents\defaultcover.rtf`.

### Using a file attachment as a cover page template

You can attach an existing file to an email you want to send as a broadcast message and designate that attached file as the cover page template.

To use a file attachment as a cover page template, you save the file with the special prefix, `_SCCP_` and attach it to the email.

For example, if you attach a file named `_SCCP_My_Cover_Page.rtf` to an email message, the attachment is used as the cover page template for that message.

### Naming and storing custom cover page templates for faxes sent from your email client

You can create cover page templates and associate them with a company, a department within a company, or a particular user.

To distinguish between cover page templates on a per-company, per-department, and per-user basis, name and store your templates using the following conventions:

Type	Filename convention	Location
Company with multiple email domains	<code>company_domain.rtf</code> , where <code>company_domain</code> is the unique email domain for the company.	<code>\Stroom\CoverPages</code>
Company with a single email domain	<code>company.rtf</code> , where <code>company</code> is the unique name for the company stored in the Cleo Stroom database.	<code>\Stroom\CoverPages</code>
Department	<code>department_name.rtf</code> , where <code>department_name</code> is the department name stored in the database. Because departments are associated with a company, department names need only be unique within the company they belong to. The company associated with the department is determined	Departments belonging to companies with multiple email domains is not supported.  For departments belonging to companies with a single email domain: <code>\Stroom\CoverPages\&lt;company&gt;</code>
User	<code>user_email.rtf</code> , where <code>user_email</code> is the unique user email address.	For companies with multiple email domains: <code>\Stroom\CoverPages\&lt;company_domain&gt;</code>

Type	Filename convention	Location
	For example, for the user joe@companyone.com, the file must be named joe.rtf	For companies with a single email domain: \Stream\CoverPages \<company>

## Password Strength and Management Capabilities

Cleo Stream supports customer password strength policies with the ability to choose passwords that are complex and cryptic enough to prevent others from cracking them, whether through social engineering or hacking. Cleo Stream also supports customer password expiration and reuse history policies, as well as customer account lockout policies, to further help prevent unauthorized user and data access.

The set of Cleo Stream password strength and management capabilities used to support these customer account security policies are listed below. To view and modify the options, navigate to **Notify > Admin > System Manager > Configuration > Master Config**. Set the **PasswordHardening** field to 1 to turn these settings on.

- Support for password strength:
  - **MinPasswordLength**: Passwords must be at least a configurable number of characters long. Default: 8
  - Passwords must include lowercase and uppercase characters, numbers, and symbols.
- Support for password expiration and reuse:
  - **MaxPasswordAge**: Passwords expire after a configurable number of days. Default: 90
  - **PasswordHistoryCount**: Passwords cannot match a configurable number of last used passwords. Default: 5; Max: 5
  - Passwords must be reset on first login.
- Support for password lock/unlock:
  - **AccountLockoutThreshold**: Passwords lock after a configurable number of unsuccessful attempts. Default: 5
  - **AccountLockoutDuration**: Passwords unlock automatically after a configurable number of minutes. Default: 60
  - Password lock counter is reset after 5 minutes.
  - Passwords can be unlocked by administrators.



**Note:** While Cleo Stream considers all the different types of fax destination types (email users, Xerox devices, network printers, filesystem folders, etc.) as "users" in the system, it is important to note that for the purposes of password strength and management capabilities a user is defined exclusively as an interactive user that can login to the Cleo Stream web interface with an email/password combination.

# 3

## Setting up fax security

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You can configure your Cleo Stream system to allow only authorized users to fax from authorized clients. Configuration occurs at several levels:

- Server
- Client
- User

### Enabling fax access security at the server level

---

You enable fax access security in the Cleo Stream Server to allow the client- and user-level configurations to be effective.

1. If necessary, log in to Cleo Stream as a user with an `Admin` role.
2. Click the **Admin** toggle to the admin-only portion of Cleo Stream.
3. Go to **System Manager > Configuration > Master Configuration**.
4. Scroll down to the **ClientAccessSupport** field and enter 1
5. Click **Submit**.

### Enabling fax access security for a Cleo Stream user

---

To enforce fax access security, you must enable it for each user.

1. If necessary, log in to Cleo Stream as a user with an `Admin` role.
2. Click the **Admin** link to toggle to the admin-only portion of Cleo Stream.
3. Click **User Manager > User > Search** to find the user for which you want to enable fax access security and click the user's name.  
The **Manage Profile** page displays.
4. Click the **Preferences** tab and select `Yes` from the **Allow Fax** drop-down menu.
5. Click **Save** to dismiss the **Manage Profile** page.

### Enabling fax access security for the MFP client

---

To enforce fax access security for the MFP client, you must enable it explicitly.

1. Log in to the machine where the Cleo Stream Server is running.
2. In a text editor, open the file `<STREEM_INSTALL_DIR>\etc\xstream\xstream.xml`.
3. Set the `secure-fax-enabled` key to `true`.

```
<secure-fax-enabled value="true"/>
```

4. Save the `xstream.xml` file.

## Enabling fax access security for the Cleo Stream Print client

---

To enforce fax access security for the Cleo Stream Print client, you must enable it explicitly.

1. Log in to the machine where the Cleo Stream Server is running.
2. Stop the `Stream Print Server` service.
3. In a text editor, open the file `<STREEM_INSTALL_DIR>\Print Server\server_properties.prop`.
4. Set the `SecureStreamPrint` property to 1:  
`SecureStreamPrint=1`
5. Save the `server_properties.prop` file.
6. Start the `Stream Print Server` service.

## Enabling fax access security for your email client

---

To enforce fax access security for sending faxes from email, you must enable it explicitly.


1. Log in to the machine where the Cleo Stream Server is running.
2. Start the `Stream SMTP Service Manager` client.  
If the Cleo Stream Server is running, double-click the mailbox icon in the system tray.
3. On the `General` tab, do the following:
  - a) Set **Global Authentication** to `Stream Database`.
  - b) Provide values for **Response SMTP Host**, **Response SMTP Port**, and **Response From Address**.
4. Click **Save**.
5. Restart the SMTP server.

# 4

## Setting up database archiving

---

Cleo Stream job data older than a certain number of days you configure is deleted from the Stream Center databases. You can configure Cleo Stream to backup your data instead of deleting it.

1. If necessary, log in to Cleo Stream as a user with an `Admin` role.
2. Click the **Admin** link to toggle to the admin-only portion of Cleo Stream.
3. Go to **System Manager > Configuration > Database Archive**.
4. Specify values for the database to be used for archiving:
  - **Server Name:** Hostname of SQL Server that will hold the archived job data. Default value: local Stream Center server.
  - **SQL User:** SQL user needed for connecting to the server above. Default value: `sa`
  - **SQL Password:** Password for the user above. Default value: same as setup by the Stream Center installer
  - **SQL Confirm Password:** Confirm the password above
  - **Archive Suffix:** Archive databases are named with this suffix appended to the original database name Default value: `_scbak`
5. Set up a schedule for archiving.
  - a) Select the **Schedule Archive** check box to enable **Archive Time** and **Active** fields.
    -  **Note:** If you clear the **Schedule Archive** check box, the **Archive Time** and **Active** fields are disabled, and an immediate, one-time archiving process begins when you click **Update Schedule**.
  - b) In the **Archive Time** field, specify the time of the day you want archiving to start. The default value is 10 PM.
  - c) Select the **Active** check box to enable the archiving schedule. Clear the check box to disable the schedule.
6. Click **Update Schedule**.



# 5

## About device information

---

Cleo Stream can enhance your MFP device by allowing users to send and receive documents via fax without the use of phone line connectivity at the MFP. Cleo Stream can also receive faxes to other devices.

You use the Cleo Stream web UI to work with information about devices connected to your Cleo Stream system. You can manually add devices one at a time using the Cleo Stream web UI. Cleo Stream web UI treats the following entities as *devices*: users, Xerox devices, Save-to folders, FTP users, and Cleo Stream printers. Alternatively, you can use a comma-separated value (.csv) file as input to an import process available from the Cleo Stream web UI. If you choose to import a .csv file, it must be in the correct format.

## About importing device information

---

You can populate and import a comma-separated value (.csv) file to add a large number of devices to your Cleo Stream system at one time.

### Importing device information

You can import device information to Cleo Stream using a .csv file.

1. Prepare the .csv file.

You can import users, MFPs, and save-to-folders.

Various devices and users require different data to be entered as follows:

Name	Type	Required fields
User	1	email address
Xerox device	2	IP address fax confirmations
Save To Folder	3	path fax
FTP	4	username path IP address User ID PIN
Printer	5	path

Name	Type	Required fields
		fax
Document Management User	6	path email address

2. Log in as a user with a role of Administrator or Company Administrator.
3. Go to **Admin > User Manager > Users > Import**.
4. Click **Choose File** and then navigate to the .csv file you prepared.

## Preparing your .csv file for importing

Before you can import data from your .csv file into Cleo Stream, you must first correctly populate it with the data you want to import.

You can download either a template .csv file or export a .csv file populated with data from your Cleo Stream database.

The .csv file contains the following fields in this order:

Field	Description
firstname	User's first name.
lastname	User's last name.
username	User's user name.
password	User's Cleo Stream password.
fax	Fax number
email	email address
role	Numeric value representing the user's role. See <a href="#">About roles and permissions</a> on page 10
otherfax	Semi-colon separated list of additional fax numbers.
company	Name of the company defined for this user.
dept	Name of the department within the company defined for this user.
userid	User's numeric user id (1-8 numbers).
userIdPIN	User's numeric PIN, used for AC Record, FTP password, and secure PDF password (1-12 numbers).
FaxFormat	The user's fax format preference, must be one of: (PDF, TIF, TIF & PDF).
NoCoverPage	Numeric value indicating if the person does not want to use a cover page (1=no cover page, 0=use a cover page).
BillingCode	
DefaultApp	

Field	Description
Path	
IPAddress	
Description	
Type	
FaxInLength	
Confirmations	

## About adding devices manually

You use the Cleo Stroom web UI to manually add devices to your Cleo Stroom system.

### Adding a Xerox MFP to receive faxes

1. Log in as an Admin.
2. Go to **User Manager > Users > Xerox Devices**.
3. Enter the information required to define a Xerox device.
  - IP Address that was assigned to the Xerox Device
  - Fax number that is to be assigned to the Xerox Device
  - Company
  - Department
  - A description to help identify the device
  - A billing code (optional)
  - A paper color or keep the default (white)
  - Page Length in pixels. Enter 2100 for 7345 Xerox models and 2200 for all other Xerox devices.
  - Confirmations. Specify the type of confirmation to print or send.
  - POP/IMAP Email Account. Specify an email address to receive emailed instead of printed confirmations.
4. Click **Add Device**.

### Adding other MFP devices

Other MFP devices can be added under Xerox Devices with the caveat that the device must support 1p and PDF. By changing the StroomFax-Inbound workflow parameter, MfpPrintPDF, Cleo Stroom will print a PDF instead of DAT to any device configured as a Xerox device. When MfpPrintPDF is enabled, the settings for paper color and page length are no longer applicable. Be sure to set MfpPrintPDF before adding another brand MFP, as printing a DAT to a device other than a Xerox device can result in printing errors.

StroomFax-Inbound workflow parameter options:

- MfpPrintPDF=1: PDF is printed
- MfpPrintPDF=0: DAT is printed

When enabling MfpPrintPdf, you should also adjust the page resolution by changing the -r option found in the StroomFax-Inbound workflow parameter PdfCommand from -r200 to -r204: `$stroom_center_path\tools\image2pdf\img2pdf.exe -x 1 -r 204 -o %s %s`

Contact Cleo Stream support for additional assistance adding other MFP devices.

## Add a new FTP User

1. Log in to Stream as an Admin.
2. Go to **User Manager > Users > FTP Users**.
3. Enter the information required to define an FTP user in Cleo Stream.
  - URL for the FTP site
  - folder path on the FTP site
  - Fax number that is to be assigned to the FTP User
  - Username used to log into the FTP site
  - Password for the FTP site
  - Re-enter the password for the FTP site for verification
  - Company
  - Department
  - Select a file format. Select `SecurePDF` to encrypt the document with the FTP site password.
  - Enter a description to help identify the device
  - Enter a billing code (optional)
4. Click **Add FTP**.

## Add a new Save-To-Folder

1. Log in to Cleo Stream as an Admin.
2. Go to **User Manager > Users > Save-To-Folders**.
3. Enter the information required to define a Save-To-Folder in Cleo Stream. All fields are required except for the Password if the Format is not Secure PDF.
  - Path to the folder where faxes will be saved. The folder must exist before adding it to Cleo Stream. If the folder is not located on the Cleo Stream server, file permissions might be an issue. Make sure you use the UNC path, not the local path, to the folder.
  - Fax number that is to be assigned to the folder
  - Company
  - Department
  - A format for the saved faxes
  - Description to help identify the folder
  - Password if you selected Secure PDF as the file format
  - Email address. Cleo Stream will send an email with a link to the fax saved in the Save-To-Folder
4. Click **Add Folder**.

## Add a new Cleo Stream Printer

1. Log in to Cleo Stream as an Admin.
2. Go to **User Manager > Users > Stream Printer**.
3. Enter the information required to define a Cleo Stream Printer.
  - Printer name. The printer must be installed on the Cleo Stream Server before adding it to Cleo Stream.
  - Fax number that is to be assigned to the printer.

- Description to help identify the printer.
  - Company
  - Department
  - IP Address (optional reference for User search).
  - Billing code (optional).
  - Page Length in pixels (default is 2200).
4. Click **Add Printer**.

## About fax routing

---

You can configure Cleo Stroom Notify to allow an administrator to manually move or copy a received fax to another Stroom User or Save-to Folder. When you enable fax routing, **View Fax** link on the **Stroom Notify Received** page displays a dialog box that allows the admin to select the destination of the move or copy. The **Status** column on the **Received** page displays an indicator for routed faxes that you can hover on to see routing details.

To enable fax routing, use the following Stroom Notify Master Config option:

### **EnableRouteFax**

Controls fax routing. You can specify whether the admin can move or copy a received fax.

#### **Possible values:**

- 0 - Default, no routing
- 1 - Move
- 2 - Copy



# 6

## About system monitoring

---

Cleo Stroom includes functionality that enables you to monitor the entire system.

The Cleo Stroom monitoring (`monitorsvc`) service is a script-based utility you use to monitor a Cleo Stroom system on a continuous basis. The Monitoring service proactively monitors other Cleo Stroom services and attempts to restart those services if they stop running. In addition, the Monitoring service performs a series of tests that exercise different parts of the system, and measures the results against an expected set of outcomes. These tests are repeated and status is reported at a regular interval. See [About system monitoring tests](#) on page 32.

If a problem is found during any of these tests, all the relevant information is logged to the Windows Event Log and an email message is immediately sent to a pre-configured list of email recipients. If all tests are successful, an email message is sent to the same recipients indicating that the test was successful. The success email is optional. The monitoring service can also send SNMP notifications for failure conditions to a user's SNMP manager. See [About system monitoring reports](#) on page 33.

## Installing and running monitorsvc

---

The Stroom Center Monitoring Service is named `monitorsvc` and is automatically installed as part of the Stroom installation.

`monitorsvc` is configured for Automatic (Delayed Start) as it is responsible for starting other Cleo Stroom services, which are configured for Manual startup.

In a run state, the monitoring service uses the `monitorsvc.cfg servicelist` to monitor and automatically start stopped Cleo Stroom services.

At startup, the monitoring service checks if the `stroomcenter` service is running, and calls `startup_all.cmd` if it is not. The order in which Cleo Stroom services are started is coded and documented in `startup_all.cmd`. Likewise, the orderly shutdown of Cleo Stroom services is coded and documented in `shutdown_all.cmd`.

It might be necessary to stop or temporarily set `monitorsvc` to manual startup allowing you to verify configuration before changing back to Automatic (Delayed Start).

The service can also be manually controlled by command line.

- To manually start the service: `net start monitorsvc`
- To manually stop the service: `net stop monitorsvc`

To debug the service, it can be run as a console application with extra debug output.

To start the monitoring service in debug mode:

- Open a command window at `C:\Python34\Lib\site-packages\stroom\svc\monitorsvc`
- Enter `net stop monitorsvc` to make sure the service is stopped
- Enter `__init__.py debug`



**Note:** To debug other Cleo Stream services, use the `Setdebug.cmd` to prevent the monitoring service from automatically starting Cleo Stream processes and services that are run from command line while debugging.

Setdebug creates the file, `__debug__.lck` in `C:\Stream`.

Usage: `Setdebug [on|off]`

## Configuring monitorsvc

---

The monitoring service expects a configuration file named `monitorsvc.cfg`. This file must be located in `%STREEM_CENTER_PATH%\etc\monitorsvc`.

The following is a sample `monitorsvc.cfg` file

```
[options]
customer=Customer Name
testserver=stream_center_server
testport=25
notifyserver=email_server
notifyport=25
notifyaddr=person@customer.domain
notifyfailureonly=1
droptoaddr=0123456789@scmonitor
sendtoaddr=88885551212@customer.fax.domain
fromaddr=monitor@stream.net
dropfrequency=3600.0
sendfrequency=300.0
testdropdir=c:\stream\smtpdrop\scmonitor
faxdropdir=c:\stream\temp\ScMonitor
attachment=c:\stream\documents\ScMonitor.pdf
capxml=C:\Stream\etc\monitorsvc>alert-fev.xml
ports=
snmpserver=127.0.0.1

[monitor]
smtp=0
fax=0
tts=0
alert=0
xerox=0
folder=0
prn=0
disk=0
services=1
metrics=0
archive=0

[folder]
folders=c:\stream\temp\folder1, c:\stream\temp\folder2
intervals=10,20

[disk]
low=15

[metrics]
frequency=00:00
outboundenabled=1
```

```

inboundenabled=1
outboundnumdays=
jobfailurerate=50
attemptfailurerate=50
inboundfailurerate=50
inboundnumdays=

[services]
defaultwp=wp3
servicelist=activemq,MSSQLSERVER,StroomCenter,streamdb,streamdc,streamwm,
streamws,spserver,SCSMTPService,ScSpeech,convengsvc
enableactions=1
restartdelay=5
maxattempts=3

```

## Options section

### customer

Customer name that appears on the subject line of emails.

### testserver

Server Cleo Stroom SMTP service is running on.

### testport

The SMTP port the Cleo Stroom SMTP service is listening on.

### notifyserver

The SMTP server to use for notification emails.

### notifyport

The SMTP port the notification server is listening on.

### notifyaddr

The email address to send notifications to.

### notifyfailureonly

If set to 1, only failure emails are sent. Default value is 1.

### droptoaddr

The test drop email address. The domain portion of this email address is configured in the Cleo Stroom Center SMTP server to point to a drop sub-directory (scmonitor) that is not used by customer for faxing.

### sendtoaddr

The email address used for testing an actual fax delivery. The domain portion of the address should be a domain that is being picked up by the Cleo Stroom's outbound faxing workflow. The account portion is a test account that is set up in the `SystemUserList` table. This user is setup to have their faxes dropped as a `.tif` file to a temp folder located on the Cleo Stroom server.

### dropfrequency

The amount of time to delay (in seconds) between test cycles.

### sendfrequency

The amount of time (in seconds) to wait for a fax to be received into the test account.

### testdropdir

The test drop directory location. This is the directory where emails sent to `droptoaddr` will have files dropped.

### faxdropdir

The directory that will receive the test fax for the test `SystemUserList` account.

**attachment**

The name/path of file to be sent as attachment for fax tests.

**capxml**

The name/path of the CAP xml file used for the alert test.

**ports**

Number of hardware ports installed on this Cleo Stream system

**snmpserver**

Comma-separated list of IP address(es) of one or more user SNMP servers or default 127.0.0.1.

**Monitor section**

**smtp**

Run the SMTP server test (1) or not (0). Default value is 0.

**fax**

Run the inbound/outbound fax test (1) or not (0). Default value is 0.

**tts**

Run the Text-to-Speech conversion test (1) or not (0). Default value is 0.

**alert**

Run the fax, voice, email test (1) or not (0). Default value is 0.

**xerox**

Run the Xerox test (1) or not (0). Default value is 0.

**folder**

Run the folder monitor test (1) or not (0). Default value is 0.

**prn**

Run the PRN monitor test (1) or not (0). Default value is 0.

**disk**

Run the Hard Disk Drive test (1) or not (0). Default value is 0.

**Services**

Run the Stream and System services test (1) or not (0). Default value is 1.

**metrics**

Run the Stream Metrics test (1) or not (0). Default value is 0.

**archive**

Run the Archive test (1) or not (0). Default value is 0.

**Folder**

**folders**

Comma-separated list of folders to watch.

**intervals**

Comma-separated list of time intervals associated with the folders listed in the `folders` field. If any file in a watched folder is older than its associated interval, an appropriate error message is generated. The number of intervals listed must be equal to the number of listed folders.

**Disk****low**

The disk space threshold in gigabytes.

**Metrics****frequency**

The frequency at which to execute metrics (24-hour clock [00-23:[00-59]; for example, 00:00 for midnight). If blank, it executes on the previously mentioned `dropfrequency`, under **options**.

**outboundenabled**

Determines whether to execute outbound metrics (1) or not (0). Default is 0.

**inboundenabled**

Determines whether to execute inbound metrics (1) or not (0). Default is 0.

**outboundnumdays**

Number of days for which to pull outbound metric data. This will grab data from the current date minus the number of days set below (for example, specify 5 for five days). Default is 2 days.

**jobfailurerate**

Determines how often reports are emailed back to support. When the rate of job failure exceeds this configured rate (read percentage), an email is sent to support. The value is a percentage and should range from 0 (no failures) to 100 (all failures).

**attemptfailurerate**

Determines how often reports are emailed back to support. When the rate of failed attempts exceeds this configured rate (read percentage), an email is sent to support. The value is a percentage and should range from 0 (no failures) to 100 (all failures).

**inboundfailurerate**

Determines how often reports are emailed back to support. When the rate of failed inbound faxes exceeds this configured rate (read percentage), an email is sent to support. The value is a percentage and should range from 0 (no failures) to 100 (all failures).

**inboundnumdays**

Number of days for which to pull inbound metric data. This will grab data from the current date minus the number of days set below (for example, specify 5 for five days). Default is 2 days.

**Services****servicelist**

The list of services to monitor. Any short service name that is added to this list will be monitored. Default is:

```
activemq, MSSQLSERVER, StroomCenter, streemdb, streemdc, streemwm,
streemws, spserver, SCSMTPService, ScSpeech, convengsvc
```

**enableactions**

Determines whether or not to try to restart any of the services defined in the `servicelist`, if they were stopped or they crashed. To enable this setting, set the value to 1, otherwise 0. Default is 1.

Services are checked every 300 seconds by default. To change the service check frequency, add `svccheckfrequency=` to the `options` section of `monitorsvc.cfg` with the desired check frequency in seconds. You should consult with Cleo Stroom support before changing the `svccheckfrequency` setting.



**Note:** If you manually shut down the Stream services, and the monitoring service is still running with `enableactions` set to `true` (1), the monitoring service will try to start all of the services that are stopped, and defined in the `servicelist` above.

To prevent the monitoring service from attempting to restart a service in the `servicelist`, temporarily set the service to `Disabled`.

#### **restartdelay**

The amount of time to wait between service restart attempts (in minutes). For example, specify 5 for five minutes. Default is 5.

#### **maxattempts**

The maximum number of attempts at restarting a service before reporting an error. Default is 3.

## About system monitoring tests

---

The Cleo Stream Center Monitoring service tests certain components of the Cleo Stream system on a regular basis. By default, the *Services* tests are performed *once every 5 minutes (300 seconds)*. See [Configuring scMonitor](#) for information about specifying other tests to run and how often to run them. Other tests, when enabled, are performed sequentially every hour (set by `dropfrequency=3600`) in the order they are presented below:

### **Services**

- Monitors Stream services, as well as the services used by Stream.
- Always the first test to run.
- Restarts stopped services listed in `servicelist` that are not disabled, when `enableactions=1`

### **Cleo Stream Center SMTP Service**

- Sends an email to the Cleo Stream Center SMTP Service using a test drop domain called `scmonitor`.
- Checks the `scmonitor` drop directory location for a successful drop by the SMTP server (`.dat` file).

### **Faxing – Outbound and Inbound**

- Sends an email to the Cleo Stream Center SMTP Service using a real drop domain and a test account that will cause a fax to be sent back into Cleo Stream Center. The fax is sent (and received) with a PDF attachment.
- Checks for a received `.tif` image.

### **Text-to-Speech**

- Drops a file to the TTS convert folder.
- Checks for a valid `.wav` file.

### **Broadcast – Voice, Fax and Email**

- Sends a broadcast using Cleo Stream Center's Common Alerting Protocol (CAP) interface. The types of destinations (`voice`, `fax` and `email`), how many messages are sent to each destination, and other attributes (for example, `fax attachment`) of this test broadcast are controlled by a CAP-format XML file. The default file creates a test broadcast with one voice, fax, and email destination each.
- Checks the status of the broadcast job and each destination for successful completion.

**Folder**

- Checks the age of files in all the specified folders.

**Disk**

- Checks the amount of disk space left.

**Metrics**

- Monitors the failure rate of inbound and outbound fax/voice calls.

## About system monitoring reports

---

Every time the system monitoring tests are executed, the `monitorsvc` service generates a report that is emailed to a pre-configured list of recipients.

If all the tests are successful, `monitorsvc` sends out a *test successful* email.

```
Subject: ** SUCCESS - Customer Name - Cleo Stroom Center Notification **
        All tests were successful.

Company:      Customer Name
System:      Cleo Stroom Center
Server:      stream_center_server
Time:        2008/08/13 11:01:02

Tests:
SMTP Server:      Successful
Fax Outbound:     Successful
Fax Inbound:      Successful
Broadcast Fax:    Successful
Broadcast Voice:  Successful
Broadcast Email:  Successful

        Continuing to monitor the system.
```

In case one of the tests fails, `monitorsvc` sends out a *failure* email.

```
Subject: ** FAILURE - Customer Name - Cleo Stroom Center Notification **
        Error Dropping Message To Cleo Stroom SMTP Server.
Additional
        details have been logged to the Windows Event Monitor.

Company:      Customer Name
System:      Cleo Stroom Center
Server:      stream_center_server
Time:        2008/08/13 11:01:02
```

If PRN monitoring is activated, `monitorsvc` sends out an email at an interval defined by the `dropfrequency` option specified in the `monitorsvc.cfg` file during the voice call window specified in `job_alert.ini`:

```
Subject: PRN calling update. - Customer Name
```

```
2317 out of 2317 calls completed.
```

```
Last 5 jobs completed:
```

Job Number	Status	Time Finished
334140	Completed	2011-05-30 16:41:49.097000
334139	Completed	2011-05-30 16:41:36.743000
334138	Completed	2011-05-30 16:41:24.337000
334137	Completed	2011-05-30 16:41:11.960000
334136	Completed	2011-05-30 16:40:59.630000

```
Company:      Customer Name
System:      Cleo Stream Center
Server:      stream_center_server
Time:        2008/08/13 11:01:02
```

```
Tests:
SMTP Server:      Successful
Fax Outbound:     Successful
Fax Inbound:      Successful
Broadcast Fax:    Successful
Broadcast Voice:  Successful
Broadcast Email:  Successful
```

```
Continuing to monitor the system.
```

Most emails also report the state of services, for example:

```
Reports
```

```
-----
Services:
```

```
activemq - The service is running (Manual)
bostservice - The service is running (Manual)
MSSQLSERVER - The service is running (Automatic)
StreamCenter - The service is running (Manual)
streamdb - The service is running (Manual)
streamdc - The service is running (Manual)
streamwm - The service is running (Manual)
streamws - The service is running (Manual)
spserver - The service is running (Manual)
SCSMTPService - The service is running (Manual)
convengsvc - The service is running (Manual)
```

A section showing Metrics is also included at the configured *frequency* when `metrics=1`, for example:

```
Reports
```

```
-----
Metrics:
```

```
Total fax jobs: 1408
Successful fax jobs: 1405
Failed fax jobs: 3
Incomplete fax jobs: 0
Failed fax jobs w/ Attempts: 3
Successful fax jobs w/ Failed Attempts: 0
Failed Attempts for Successful fax jobs: 0
Total fax Attempts: 1414
Successful fax Attempts:1405
Failed fax Attempts: 9
```

```
Total number of failed faxes received:0  
Total number of faxes received: 0  
DB Archive: DBService Error
```



# 7

## Setting up your Cleo Stream server to send faxes

---

Before you can use your Cleo Stream server to send faxes, you must either register it with one or more Xerox MFP devices or configure an email fax connector between your server and your email system.

### Registering the Cleo application on your Xerox device

---

Before you can send a fax using your Cleo Stream server and Xerox MFP, you must install and register some software on your Xerox device.



**Note:** EIP must be enabled on your Xerox device. Contact your Xerox representative for more information.



**Note:** If you change your Cleo Stream server IP address, you must also delete the existing Cleo application from the Xerox device and re-register the Cleo application on your Xerox device using the updated IP address.

#### Device Requirements

- Target MFP must support EIP 1.5+
- Target MFP screen size must be 800x480 or 800x540
- MFP should support SFTP protocol for transferring data from Xerox machine to Stream server
- All devices connected to Stream Center must support SFTP or FTP. System cannot operate with mix of both protocol.

Your Cleo Stream server supports the following devices and firmware combinations.

Product	Minimum Firmware Version Needed
WorkCentre 5735/5740/5745/5755/5765/5775/5790	061.132.22 1.29100
WorkCentre 7525/7530/7535/7545/7556	061.121.22 1.20901
ColorQube 9301/9302/9303	071.180.20 3.05402
ColorQube 8700/8900	071.160.10 1.xxx
WorkCentre 7830/7835	Minimum not required

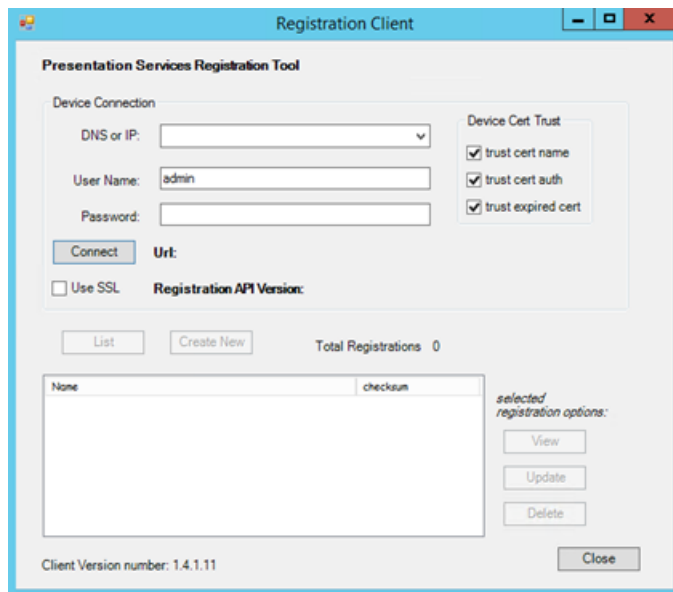
Product	Minimum Firmware Version Needed
WorkCentre 7845/7855	Minimum not required
WorkCentre 58xx	Minimum not required
WorkCentre 7220/7225	Minimum not required

1. Go to `C:\stroom\web\webapps\Xerox\reg\Registration.xml` and open `Registration.xml` using a text editor, for example, Notepad.
2. In the `Registration.xml` file, verify that all occurrences of `$(STREEM_SERVER_ADDRESS)` are replaced with the IP address you specified for your Cleo Stream server when you configured it. Make changes as needed, and then save the file.

In the event you have to change your system's IP address, you will need to update the `Registration.xml` file accordingly and re-register your system with the Xerox device.

3. Go to `C:\Stroom\Support\CleoRegistrationApp\` and run `RegClient.exe`.

The **Registration Client** dialog box appears.



4. In the **Device Connection** section, do the following:
  - a) Enter the IP address of the Xerox machine you want to register with EIP.
  - b) Enter the password of Xerox machine you want to register with EIP.
5. Make sure the **Use SSL** check box is cleared.
6. Click **Connect** to view applications already installed on the Xerox machine you are working with. Once you are connected, the **List** and **Create New** buttons are activated.
7. Click **List** to view the existing applications.
8. Click **Create New** to load the Cleo EIP application on target Xerox machine.

The **Registration Detail Form** dialog box appears.

The screenshot shows a dialog box titled "RegistrationDetailForm". It contains the following fields and options:

- Registration Name: [Text Input]
- Native Service
- Enabled
- Service Url: [Text Input]
- Description Url: [Text Input]
- Admin description: [Text Input]
- Small Icon Url: [Text Input]
- Large Icon Url: [Text Input]
- Tools Icon Url: [Text Input]
- Vendor: [Text Input]
- Service Capabilities:
  - Application UI  Optional
  - Accounting  Optional
  - Authentication  Optional
  - Authorization  Optional

Buttons at the bottom: Cancel, Load from XML, Create.

9. Click **Load from XML** button and select the `Registration.xml` file you updated earlier.  
This populates the fields in this dialog box with the contents of the `Registration.xml`.
10. Click **Create** to deploy the application to the target Xerox MFP you specified earlier.

## Configuring an Email Fax Connector

Before you can send a fax via email, you need to route email from your email solution to your Cleo Stroom server. Configuration procedures are slightly different for on-premise email solutions and hosted email solutions.

### Configuring a hosted email solution to work with your Cleo Stroom server

The following is a generic procedure to configure your hosted email solution to send email to your Cleo Stroom server followed by some more specific steps to configure your Cleo Stroom server to listen for incoming emails to be treated as faxes.

1. In your email solution, create a sub domain to which you want faxes to be routed.
2. Indicate to the email host the owner of the sub domain. Create a public DNS A record in a public environment that points to an externally facing IP. Typically, this is your firewall.
3. Create a firewall rule to route mail from that sub domain to your Cleo Stroom server.
4. Configure Cleo Stroom server to listen for incoming messages.
  - a) Go to `C:\Stroom\SMTPServer` and open `SCSMTPMGR.exe`. This is the Stroom SMTP Service Manager application.
  - b) In the Stroom SMTP Service Manager application, click the **Domains** tab
  - c) Click **Add**.
  - d) Specify the name of the domain from which you want to route fax emails and specify a Drop directory. The Drop directory is where Stroom workflow listens for emails incoming from the associated domain.
  - e) Click **OK**.

## Configuring an on-premise email solution to work with your Cleo Stroom server

The following is a procedure consisting of generic steps to configure your on-premise email solution to send email to your Cleo Stroom server followed by information about configuring your Cleo Stroom server to listen for incoming emails.



**Note:** Some on-premise email solutions have wizard-type tools to help you with this type of configuration.

See [Sample email connector for Exchange 2010/2013](#) on page 40 for a on-premise solution-specific example of this configuration.

1. In your email solution, create a sub domain to which faxes will be routed.
2. Route email addressed to that sub domain to your Cleo Stroom server.
3. Configure Cleo Stroom server to listen for incoming messages.
  - a) Go to `C:\Stroom\SMTPServer` and open `SCSMTPMGR.exe`. This is the Stroom SMTP Service Manager application.
  - b) In the Stroom SMTP Service Manager application, click the **Domains** tab
  - c) Click **Add**.
  - d) Specify the name of the domain from which you want to route fax emails and specify a Drop directory. The Drop directory is where Stroom workflow listens for emails incoming from the associated domain.
  - e) Click **OK**.

### Sample email connector for Exchange 2010/2013

This section provides an example of how to create an SMTP connector on your Exchange 2010/2013 server that will route messages to Cleo Stroom. This connector points any outbound email with a fax number in the **To** field to the Cleo Stroom system, which faxes the document to the proper destination.

1. Open the **Exchange Management Console**. Under **Organization Configuration**, select **Hub Transport**. On the right hand side of the console click **New Send Connector**.  
The **New SMTP Send Connector** wizard appears.
2. Name the connector `Cleo Stroom Fax` and then click **Next**.  
The **Address Space** page appears.
3. Click **Add** and choose **SMTP Address Space** from the drop down menu.  
The **SMTP Address Space** dialog box appears.
4. Enter `default to SMTP` in the **Type** field, `app.fax` in the **Address** field, and `1` in the **Cost** field.
5. Click **OK** to dismiss the **SMTP Address Space** dialog box and then click **Next**.  
The **Network settings** page appears.
6. Select **Route mail through the following smart host** and click **Add**.  
The **Add smart host** dialog box appears.
7. Select the **IP Address** check box and enter the IP address for your Cleo Stroom Server, click **OK** to dismiss the **Add smart host** dialog box, and then click **Next**.
8. Click **Next** until the install is finished.

# 8

## About Call status and troubleshooting

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This section describes Cleo Stroom fax result call status results and error code descriptions to help you troubleshoot any errors.

### Stroom Fax Confirmation result descriptions

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When sending a fax on your Cleo Stroom Fax system, you will receive a confirmation email at the completion of the job. This confirmation email will provide the result of the fax. The confirmation **Result** field will contain **Success** if the fax was successfully sent or it will contain **Error**, followed by a short error description, if the fax did not complete successfully.

The following is a list of short error descriptions and their full definitions:

**No answer**

The number was dialed and the remote end did not answer the call.

**Busy**

The number was dialed and the remote end was busy.

**Reorder busy**

Fast busy- all circuits are busy.

**Operator intercept**

Special Information Tone (SIT) indicating a number is no longer valid or cannot be completed as dialed (for example, not enough or too many digits).

**No dialtone**

No dial tone was detected on the line.

**No ringback**

No ring back was detected after placing the call.

**No service**

No service was detected after dialing.

**Connection timeout**

A timeout occurred (60 seconds) before a connection was established.

**Bad address**

Internal software dialing error.

**Negotiate**

An error occurred during fax negotiation.

**Training**

An error occurred during the fax training phase.

**Protocol**

A protocol error occurred during fax negotiation.

**Non fax**

A non-fax device (modem, human) answered the call.

**Unknown**

An unknown error occurred during connection or transmission.

**Disconnected**

The remote fax device disconnected during the transmission.

**File error**

A local file error occurred during the transmission.

**Alert issued**

An internal alert/error cancelled the fax.