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Data sheet

OpenText XM Fax Cloud Professional Services Onboarding

Streamline deployment, empower administrators, and increase user engagement with expert assistance by OpenText Professional Services

Despite being sold on the benefits of cloud-delivered solutions, many IT departments are reluctant to launch a cloud project without feeling confident that they can achieve seamless onboarding to the environment. Whether seeking greater business agility, lower capital commitments, more efficient use of IT resources, or any other cloud computing benefit, getting onboarding right is critical.

While the OpenText™ XM Fax™ cloud platform has been designed to be intuitive and easy to use, new customers frequently benefit from having a helping hand from the OpenText Professional Services. Specializing in cloud implementation and transition process, OpenText Professional Services greatly speeds up onboarding and migration while helping to ensure its success. The team takes a collaborative approach to facilitate adoption, empowering staff with new skills and the confidence to fully exploit their new cloud fax solution.

XM Fax Cloud Onboarding Services are available in two standard packages: Regular and Advanced. Optional add-ons are available for additional services and project coverage.

Standard Onboarding Services

	Regular Onboarding	Advanced Onboarding
Onboarding Preparation (document assistance)	**0.5 Hours**	**2 Hours**
Onboarding form	✓	✓
Site survey		✓
Statement of work		✓
Onboarding Setup & Configuration	**1.5 Hours**	**2.5 Hours**
Enterprise account creation: 1. Create account (ex. Portal.xmedius.com/companyname) 2. Invite the Administrator	✓	✓
Configure login and navigation logos	✓	✓
Set up site postmaster for Non-Delivery Receipts (NDRs)	✓	✓
Demonstrate inviting users	1 user	10 users
Demonstrate requesting new fax numbers via portal	1 number	5 numbers

Accelerates implementation of XM Fax Cloud and minimizes transition durations

Empowers administrators to leverage the technology's full potential

Supplements in-house IT staff with world-class OpenText Professional Services consultants and project managers

Maximizes user adoption

Associated OpenText products

- **OpenText XM Fax in the Cloud**

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	Regular Onboarding	Advanced Onboarding
Demonstrate porting numbers via portal	1 number	5 numbers
Assign numbers and notification destinations to users	5 users	10 users
Set up profiles and mail notifications profiles	1 profile	5 profiles
Create a default misrouted faxes rule	✓	✓
Create a coversheet	1 coversheet	1 coversheet
Set up groups	1 group	10 groups
Demonstrate installing SendFAX client, email client, and web client	✓	✓
Demonstrate configuration of web client and phonebooks/delegation		✓
Test outbound faxing with email	✓	✓
Test inbound faxing for invited users	✓	✓
Help administrator sign up for notifications	✓	✓
Set up account delegation	✓	✓
Configure phone number restriction	✓	✓
Demonstrate managing fax archiving and retention	✓	✓
Demonstrate how to access knowledge base	✓	✓
Configure MFP apps	1 app per brand	4 apps
Additional Tasks	**Sold Separately**	**Any 2 (additional sold separately)**
Set up 4 MFP connectors (send fax/access token)		2 hours
Set up advanced routing for 2 devices (direct rules SMTP printer, folder)		1 hour
Set up cloud printing integration for 4 devices (HP ePrint, Xerox Mobile Print, or MFP printing tool for XM Fax in the cloud)		2 hours
Basic active directory integration (AD_sync)		2 hours
Configure 1 public phone book		1 hour

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	Regular Onboarding	Advanced Onboarding
Set up advanced integration via SMTP (custom domain or sender policy framework record)		1 hour
Set up single sign on with SAML or ADFS		1 hour

Additional Cloud Consulting Services

Additional scheduled hours can be purchased from Professional Services on a prepaid basis. These hours can be used to expand either Regular or Advanced onboarding packages.

Additional prepaid hours are sold in packages starting at a minimum of four hours. Time can be spent as the customer requires during a six month period after the hours are purchased, with a minimum of 15 minutes being deducted for each Professional Services action.

Consulting services are available during regular business hours, Monday through Friday.

Please contact OpenText Professional Services for more information.

Example Projects:

- Provisioning
  - Users & Groups
  - MFPs (20 mins per device)
  - Additional Coversheets
  - Additional public phonebooks (30 mins per phonebook)

- Creating routing table rules

- Custom advanced writing via Python

- Integration via REST API

- Integration via web services

- Advanced Active Directory integration (AD_sync)

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: opentext.com.

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