



# WestFax Secure Cloud Fax OSA Application Install Guide

Version 2.0 (last updated 6/18/24)

## Overview

The WestFax Secure Cloud Fax OSA Application (OSA) is an On-Premises Tool that allows Sharp MFPs to send faxes via the WestFax API, enabling customers to integrate WestFax services into their Sharp MFP infrastructure with minimal effort.

At its core, the OSA runs as a Windows service and hosts modules that provide a variety of common integration points with WestFax services. Our secure HTTPS TLS 1.2+/REST web API backs all the features of the OSA. We have created the OSA to provide our customers with a robust set of configurable capabilities and features, reducing the development overhead that may be incurred with a custom WestFax API integration to the MFP or a lessor Scan to Email workflow.

## System Requirements:

### Minimum System Requirements:

- **CPU:** Intel or AMD 1.6GHz or higher CPU (Supports x86/x64).
- **Windows Servers:**  
Windows Server 2022  
Windows Server 2019  
Windows Server 2016
- **Ram:** 2GB
- **Storage:** 1GB+ Recommended
- **Access:** Windows Admin account to run Sharp OSA Application service. They must be a member of the local administrator's group & have access to logon as service on the local computer.
- Windows Service Account for Services

### Preferred System Requirements:

- **CPU:** Intel or AMD 3.6GHz or higher CPU (Supports x86/x64).
- **Windows Servers:**  
Windows Server 2022  
Windows Server 2019  
Windows Server 2016
- **Ram:** 8GB
- **Storage:** 10GB+ Recommended
- **Access:** Windows Admin account to run Sharp OSA Application service. They must be a member of the local administrator's group & have access to logon as service on the local computer.
- Windows Service Account for Services

## MFP Requirements:

- **Sharp OSA Platform Version:** 4.0+

## Internet Connectivity

The Sharp OSA Application requires a connection to the internet to access our API endpoints. The Endpoints are specifically wired into the application and are resolvable as *apisecure.westfax.com* and *apih.westfax.com*. If OSA cannot connect to the internet, it cannot route faxes through the platform to our API. You can, however, tightly control access with Firewall rules. We only require port 443 access to the servers.



## Sharp OSA Functionality Overview

### Universal Printer configuration

This service can be set up to use one fax line, and every MFP on the network can utilize that connection. This flexibility provides simple setup and configuration with little effort from the MFP side.

### Multi Printer configurations

Each MFP can have a unique configuration and unique fax line and settings. This lets you manually set each MFP's outbound fax number and settings.

### WestFax Contacts

You can also utilize WestFax's contact database to retrieve fax numbers directly from the WestFax system. These contacts are also available on the web portal and the print driver. You can set it available globally or specifically for certain fax lines.

### Default Fields

You can set the default subject and reference fields for the entire account or individual fax lines and MFPs to easily track where a fax came from and what device sent the fax.

### Web-Based Management Portal

We have built a simple web-based admin portal to manage fax lines and configuration.

This space is intentionally blank.

## Installation of Sharp OSA Application

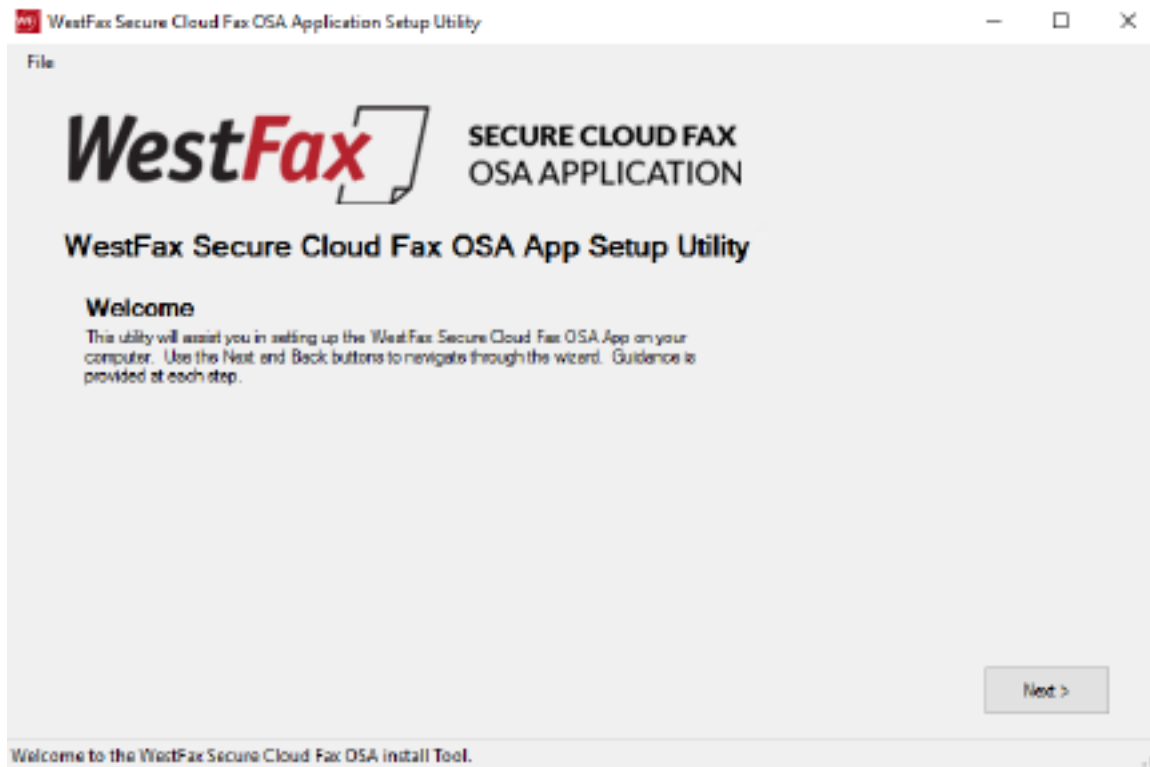
1. Download the Sharp OSA Application Setup Executable.
2. Run the Setup Executable.
3. Log into the Admin portal.
4. Configure the Fax settings.
5. Connect your sharp device to the server.

### Download the Sharp OSA Application.

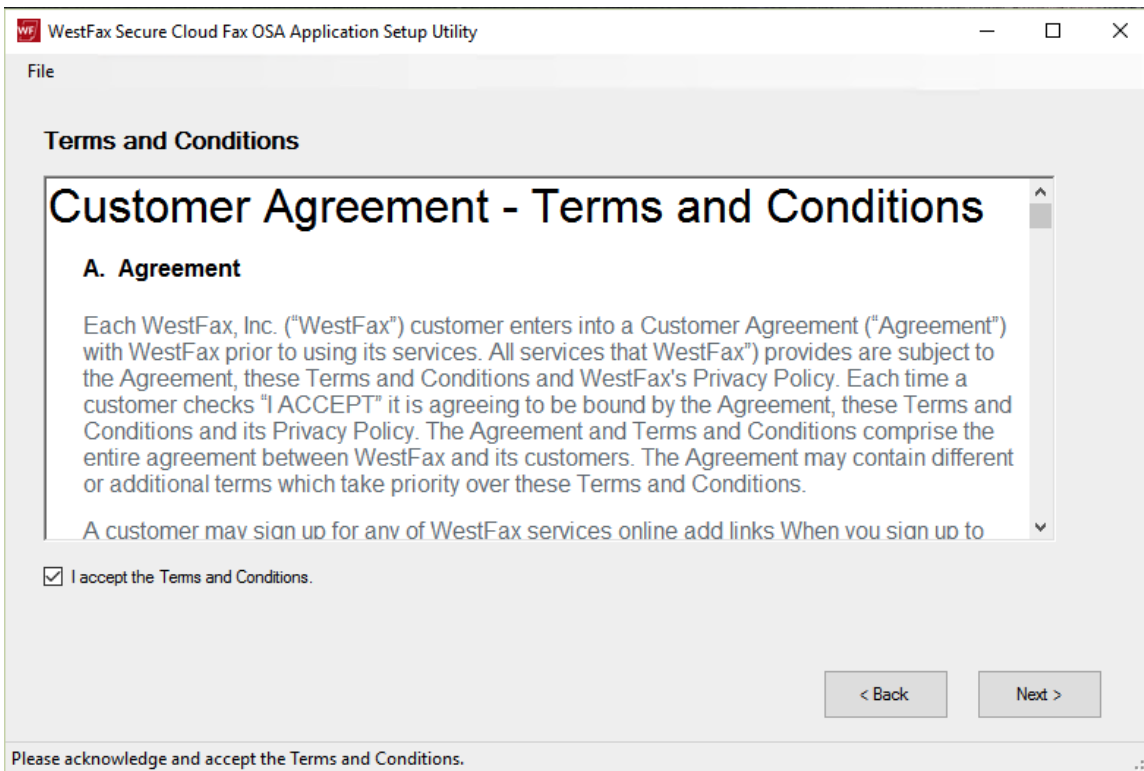
The WestFax Support representative will provide you with a link to download the latest version of the Sharp OSA Application. It is approximately 95MB in size.

### Run the Setup Executable.

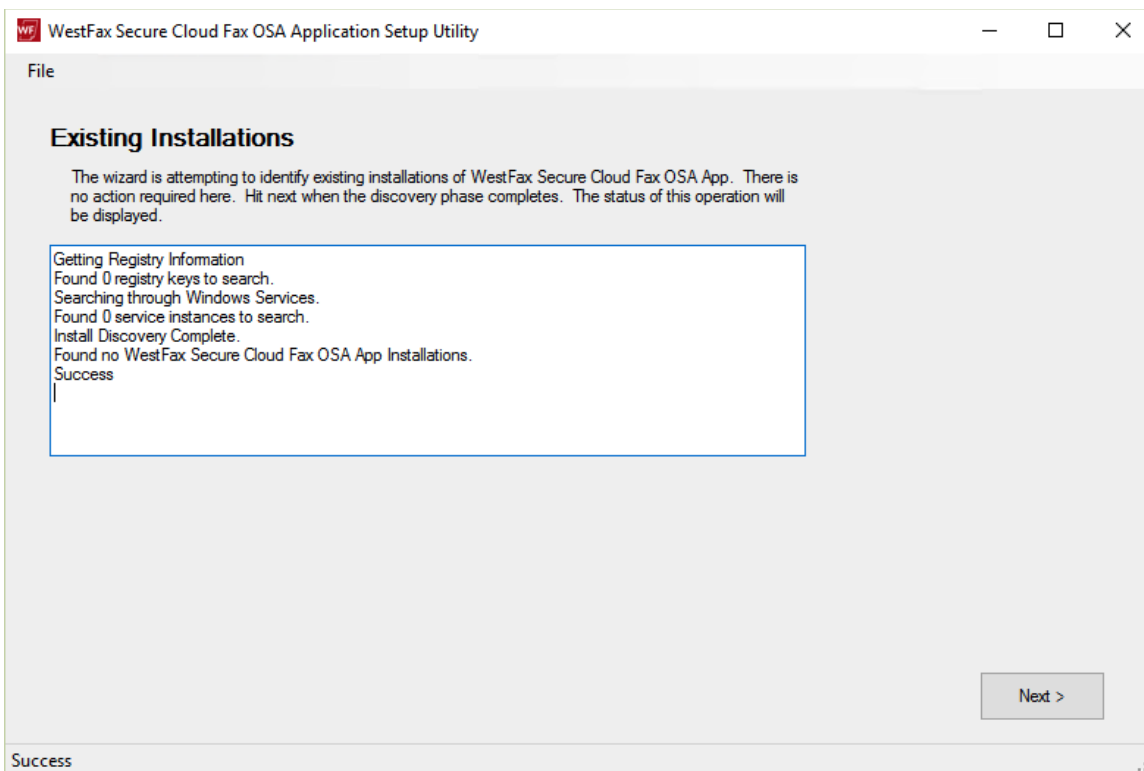
The file you want to run is WestfaxSCF.Setup.exe.



Click Next >



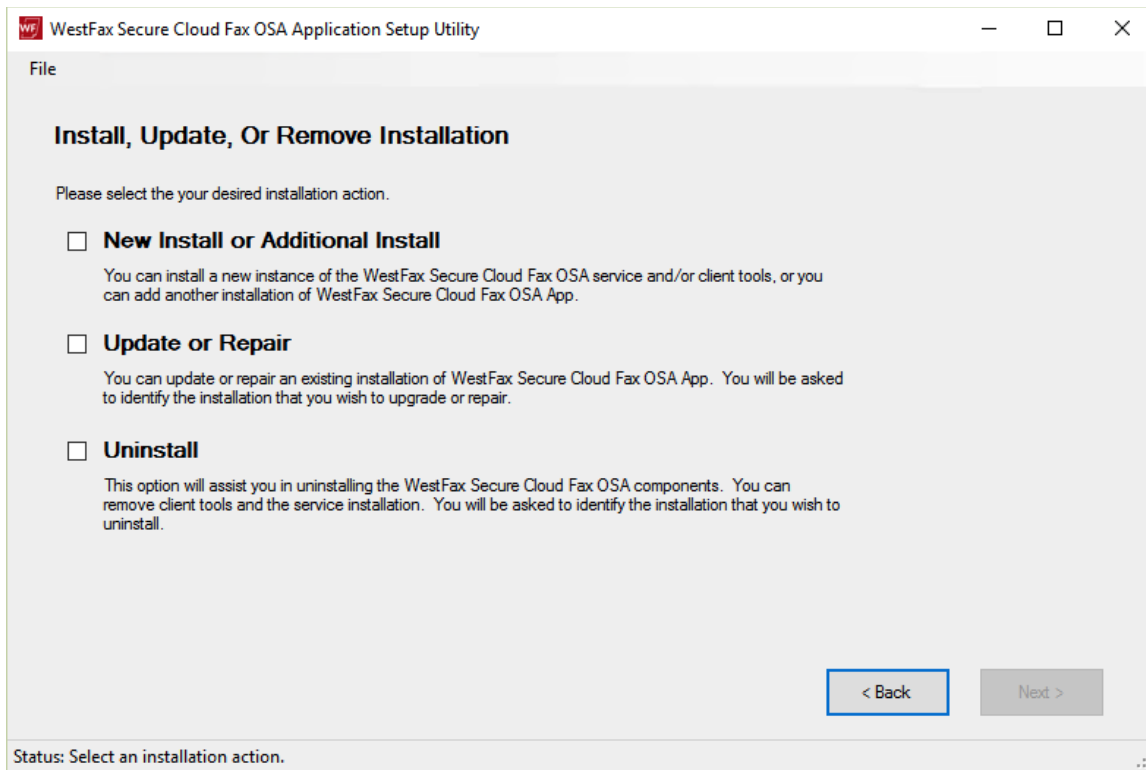
You should read the terms and conditions and click "I accept the Terms and Conditions" to continue.



We will look for existing installations (For upgrading or uninstalling).

**Click Next >**

Now, you choose the type of installation.



## **New Install or Additional Install**

This is the typical use case and what we will describe today. You can choose this option if you already have the OSA Application and are instructed to install a second instance.

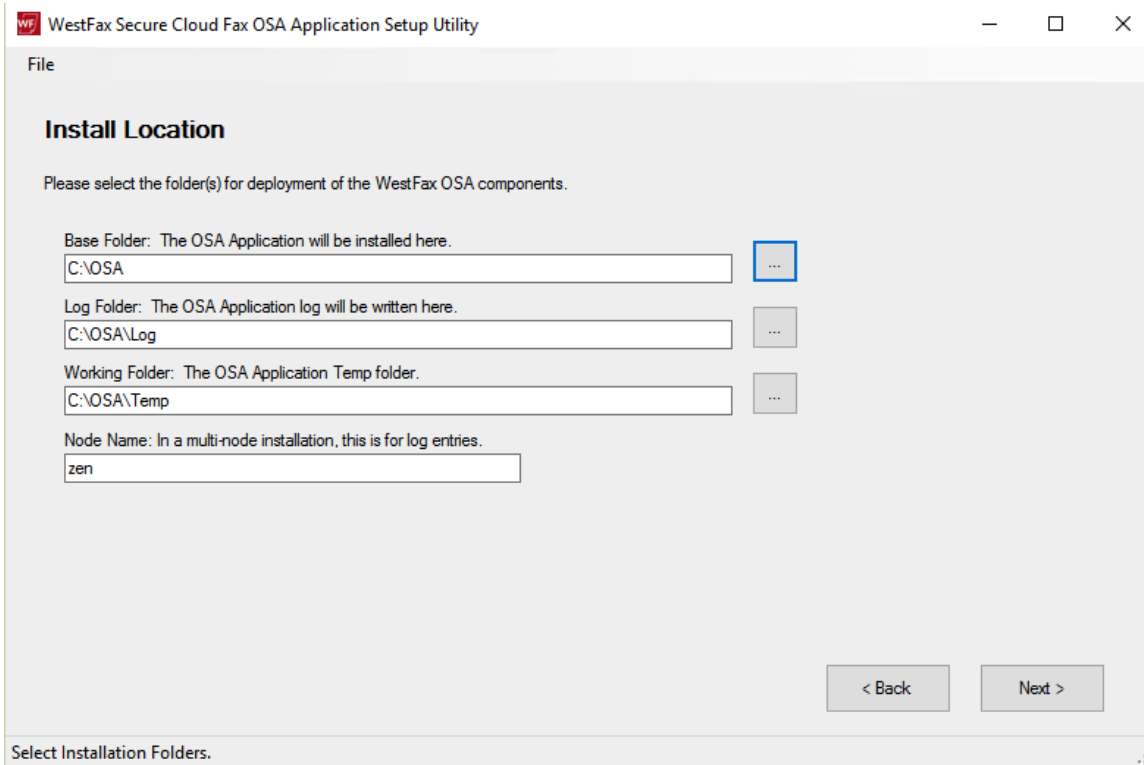
## **Update or Repair**

This is to update an older version of the Sharp OSA Application or repair a broken installation.

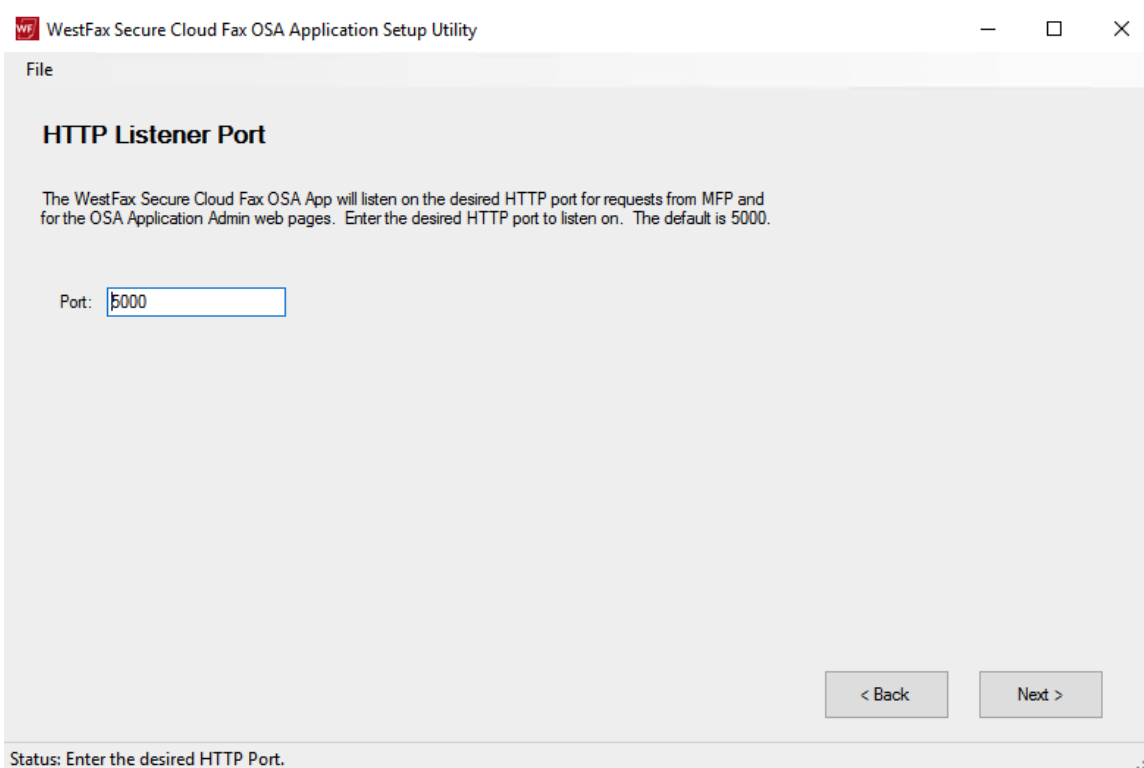
## **Uninstall**

This option is used to remove the Sharp OSA Application.

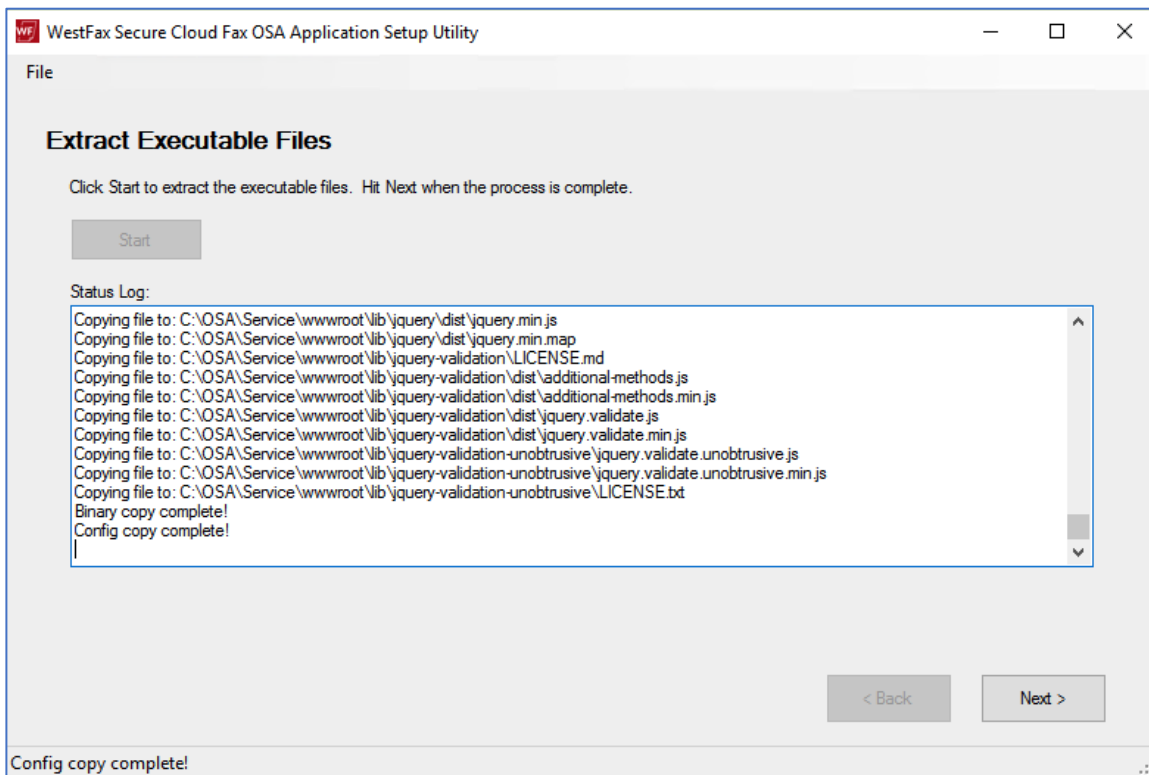
**Select New Install or Additional Install and Click Next >**



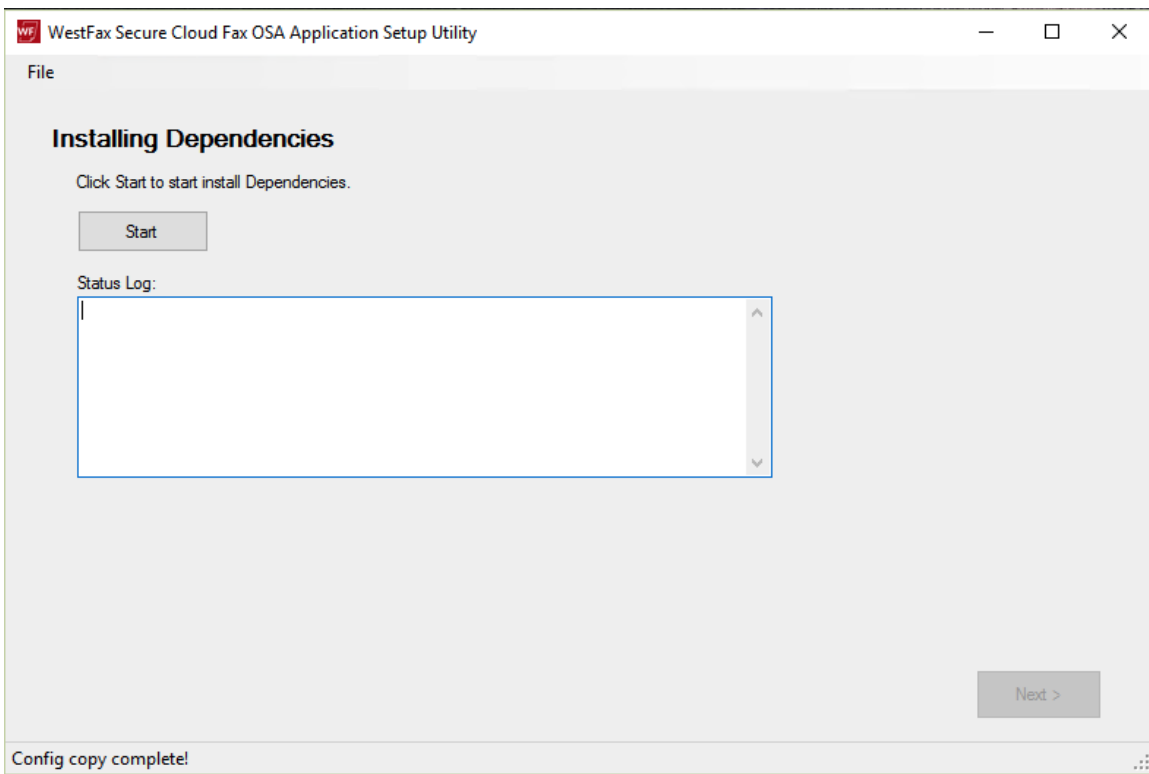
Now, you should set your default install locations. Set the first “Base Folder,” and the rest will auto-populate.



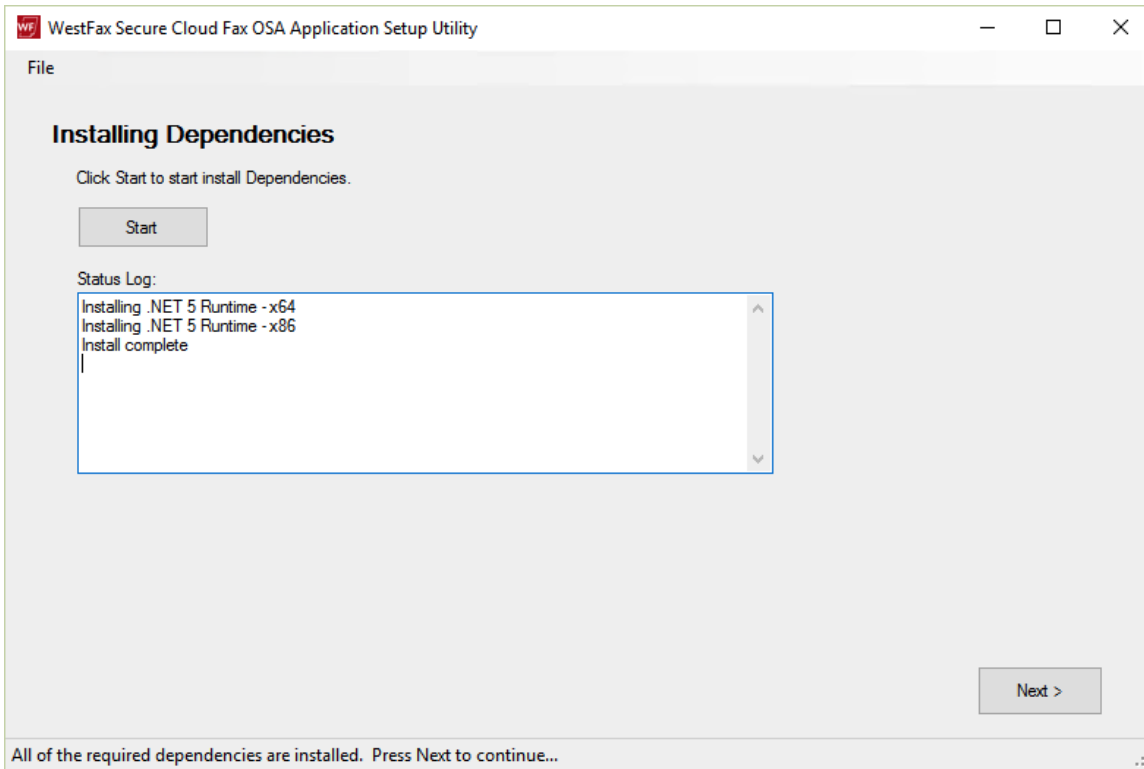
You will be asked what Port you want to install the Application on. Ensure that your firewall can route this port. The default is 5000. **Click Next >**



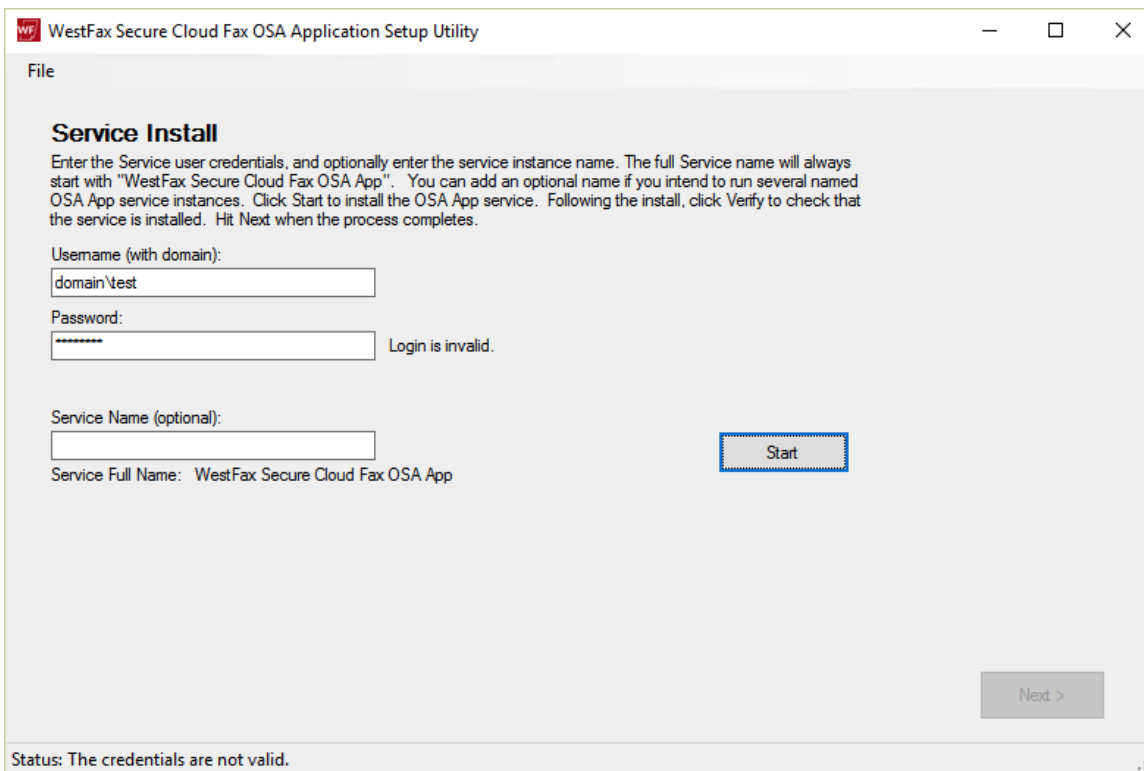
You will now see the “Extract Executable Files” page and click “Start” to have the application install itself into the specified folders. When it is done, you will **Click Next >**



Now click the Start button to install any dependencies required for the software. This will likely be .net frameworks.

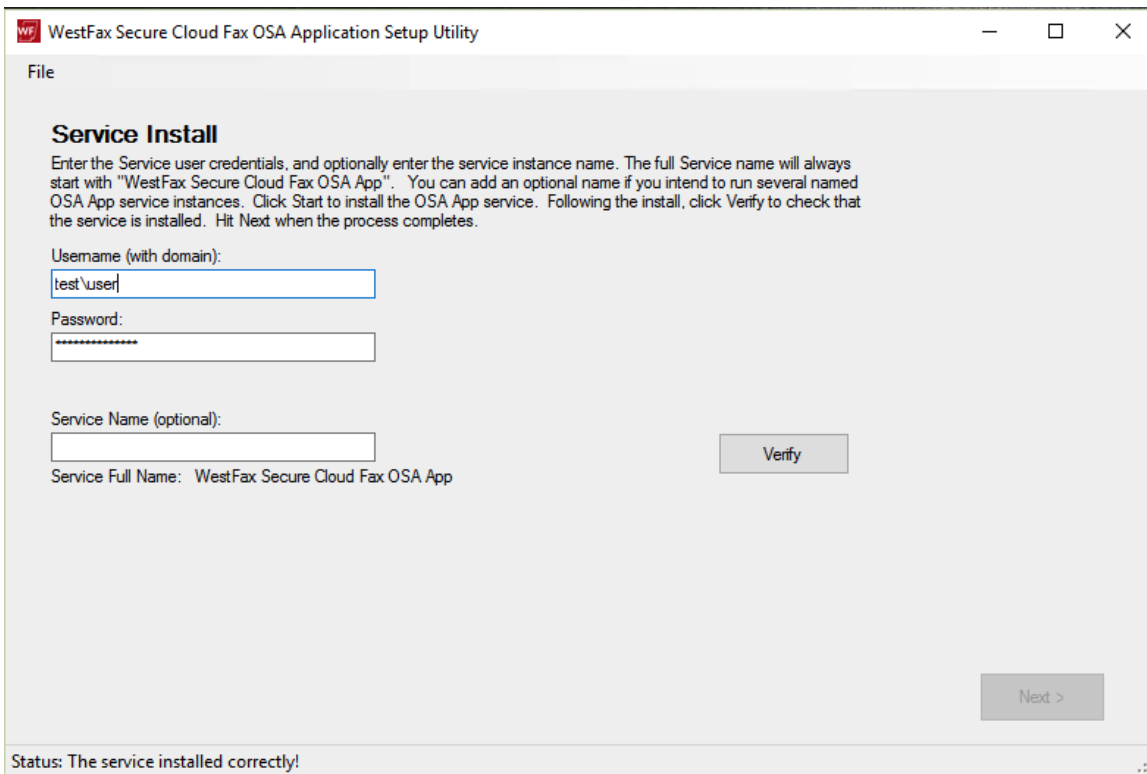


After these finish installing, **Click Next >**

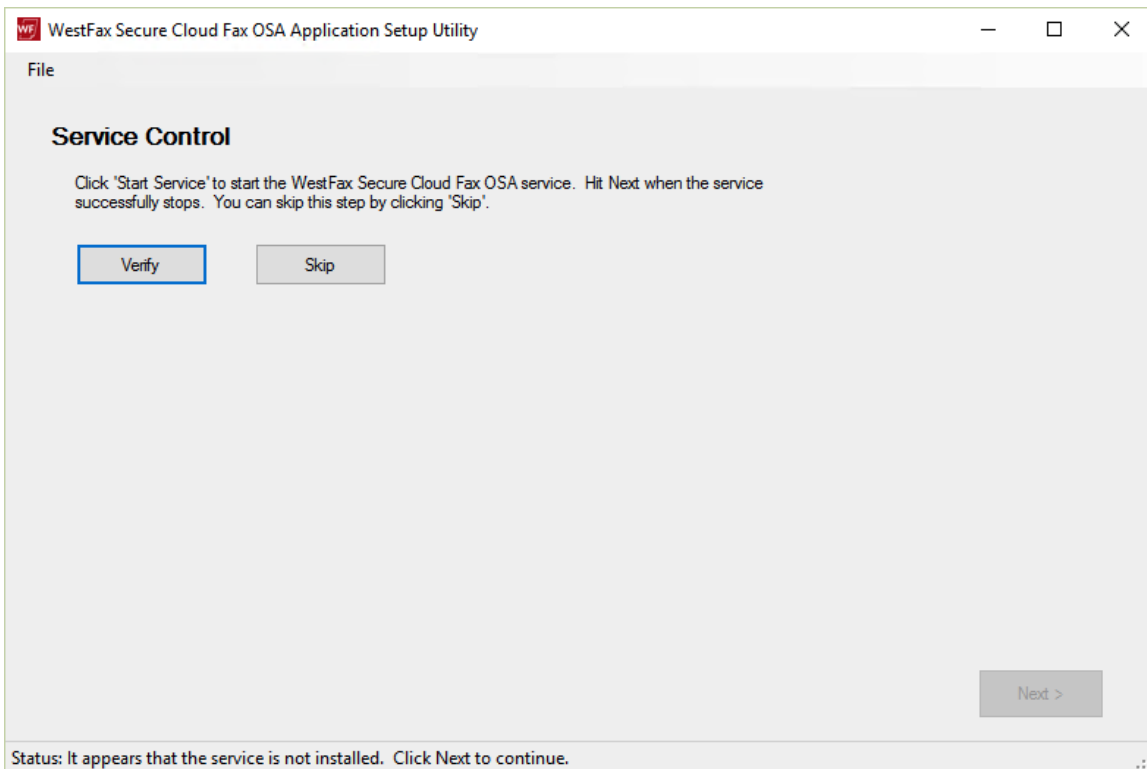


Now, you must enter an account with local administrator privileges to install the required service to operate the service. Enter a valid account and click **Start**. This account must have read/write/execute permissions on the installed WestFax Sharp Osa Application files.



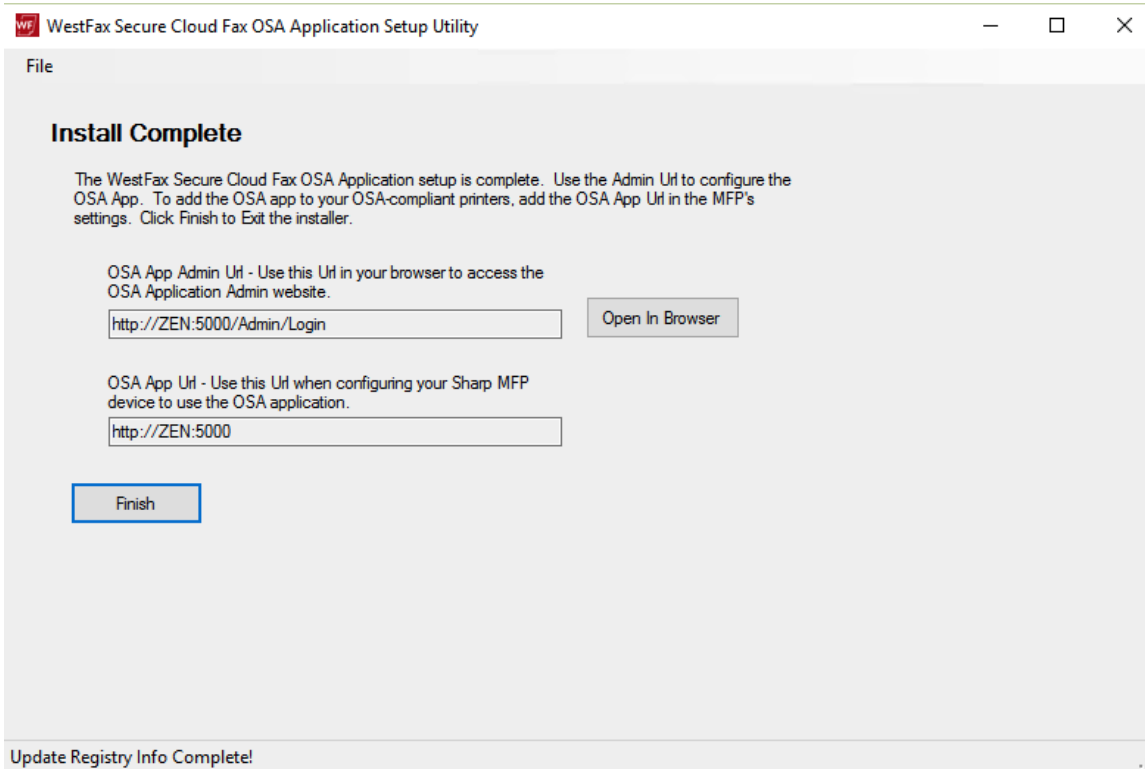


After installing it, a message will be displayed on the bottom left: **“The Service installed Correctly!”**. If you get an error message, please correct the login and try again. At this point, click the Verify Button to check that the service is installed correctly, and then **click Next >**





You can start the service now by clicking the **Verify** Button and then Clicking **Start** to start the service, or you can click **Skip** to continue without starting the service. Now **Click Next >**

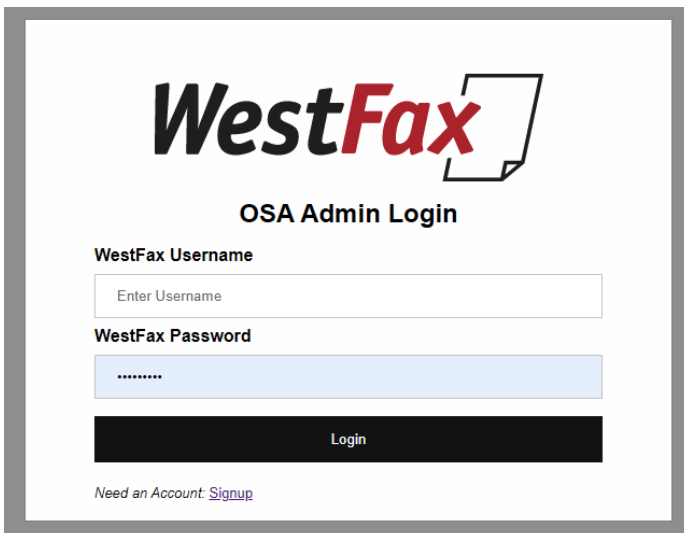


You are now presented with the information you need to manage the Sharp OSA Application.

Copy these values into Notepad for later use. Your machine name may be different, and it may also be an IP address.

## Configure the WestFax Sharp OSA Application

The link from above labeled OSA Admin App UI should be copied into your browser window, and you should be presented with a login page. Enter your WestFax Login and click **Login** to continue.



## Fax Default Settings

You will be presented with the Default settings page. This is the only page you must use to get started quickly. Configure the settings below if you have one MFP or a few that will all use the same Fax number to send. We'll also show you additional settings, but this is the only required configuration.

WestFax | Devices | Fax Defaults | Account Settings | Logout | Current Version: 2024.780.1.0 | Newest Version: 2024.732.1.4

### Default Fax Settings

Default Fax Subject	<input type="text"/>
Default Send Confirmation Email	<input type="text" value="Confirmation Email (Optional)"/>
Default Fax Line	<input type="text" value="Demo Alpha"/>
Default User	<input type="text" value="testaccount@westfax.com"/>
Allow Any MFP to use Connector?	<input checked="" type="checkbox"/>
Enable WestFax Fax Contacts	<input checked="" type="checkbox"/>
Show Global Contacts	<input checked="" type="checkbox"/>
Show Shared Contacts	<input checked="" type="checkbox"/>
Show Private Contacts	<input type="checkbox"/>

**Default Fax Subject:** (Optional) This is the default value of the fax subject. This appears in the Fax metadata in the portal ([home.westfax.com](https://home.westfax.com)) and possibly on the cover page.

**Default Send Confirmation Email:** (Optional) This is the default return address that will receive a notification of fax delivery or failure if the Sharp device cannot identify an email address sender.

**Default Fax Line:** (Required) This is the default fax line from which the faxes will be sent. You must specify a default fax line here.

**Default User:** (Required) This is the account from which the faxes will be sent. These users are managed on the Admin portal.

**Allow Any MFP to use the Application:** This setting is automatically checked. This means that you don't need to configure individual MFPs in our configuration and that any MFP connecting to the service can use this fax line. If you uncheck this option, you must manually set up each MFP in our service (shown later).

**Enable WestFax Fax Contacts:** This turns on the ability to use the WestFax contact database managed in the Home Portal. This allows users to pull from the WestFax Address book instead of manually typing in the numbers.

**Show Global | Shared | Private Contacts:** This toggle determines which contacts are visible to the MFP. Global is shared across the account, Shared is specific to the fax number, and Private is users' private contacts. Most will want to use Global and Shared.

## Setup Specific MFP Devices (Optional)

You will be brought to the Device configuration page if you click “Devices” on the top menu. To use this configuration, you must unselect “Allow Any MFP to use Application” on the previous Fax Defaults page.

The screenshot shows the 'Device Configuration' page in the WestFax application. The page includes a navigation menu at the top with 'WestFax', 'Devices', 'Fax Defaults', 'Account Settings', and 'Logout'. It also displays the current version (2024.780.1.0) and the newest version (2024.732.1.4). The main content area is titled 'Device Configuration' and contains a form for adding a new printer. The form includes a dropdown menu for 'Add a new Printer', followed by several text input fields: 'Printer Name', 'Printer Serial Number', 'Printer Location', 'Default Subject', 'Default Send Confirmation Email', and 'Fax Reference field'. There are also two dropdown menus: 'Fax Line' and 'WestFax User'. At the bottom of the form, there are four checkboxes: 'Enable WestFax Fax Contacts', 'Show Global Contacts', 'Show Shared Contacts', and 'Show Private Contacts'. An 'Update' button is located at the bottom center of the form.

**Print Name:** Enter the name of the Printer. It does not need to be a hostname. It can be anything you want.

**Printer Serial Number:** This is usually available on the back of the machine or in the configuration pages for the printer.

**Printer Location:** (Optional) This is a helpful location clue, so you know where this device is.

**Fax Line:** This is the selected fax line from which all faxes sent from this MFP will originate.

**WestFax User:** This user account will be bound to these faxes. This can be a non-human account that you set in the admin portal.

**Default Subject:** (Optional) This is the default value of the fax subject. This appears in the Fax metadata in the portal ([home.westfax.com](http://home.westfax.com)) and possibly on the cover page.

**Default Send Confirmation Email:** (Optional) This is the default return address that will receive a notification of fax delivery or failure if the Sharp device cannot identify an email address sender.

**Fax Reference Field:** (Optional) This is metadata saved into the fax for later filtering and retrieval.

**Enable WestFax Fax Contacts:** This turns on the ability to use the WestFax contact database managed in the Home Portal. This allows users to pull from the WestFax Address book instead of manually typing in the numbers.



**Show Global | Shared | Private Contacts:** This toggle determines which contacts are visible to the MFP. Global is shared across the account, Shared is specific to the fax number, and Private is users' private contacts. Most will want to use Global and Shared.

When you are complete, click **Update**. You can add as many MFPs as you want here.

## Account Settings (Optional)

If you click the Account Settings on the top menu, you will see the following:

**WestFax Username:** The username you logged in with. You can change it to use any Valid WestFax Account. The permissions on this account determine what fax lines you can manage and use, so it's best to use an Account Admin account.

**WestFax Password:** The corresponding password for this account.

**Completely Reset Configuration:** This option, if checked, will reset your entire configuration if needed. You can select the "Keep Default Email | Subject | MFP Configurations" if you want to retain certain settings after the reset.

Click Update to Confirm these settings.

That's it for the Service configuration. Next, we'll go into setting up the Sharp MFPs to connect to the Service.

## Setting up the Sharp Device

Access your Sharp OSA Administration page using your web browser. You will need Administrator privileges.

Go to > **Applications Setting > External Applications Settings.**

Enter WestFax in the **Application Name** text box entry. As for the **Address for Application UI**, enter the URL we presented at the end of the installation process. In this case, it was <http://zen:5000>, but it will be different for your server.

Set the **Timeout** to 60 seconds at the minimum.

If there is a **Data Size** field, select Wide-SVGA.

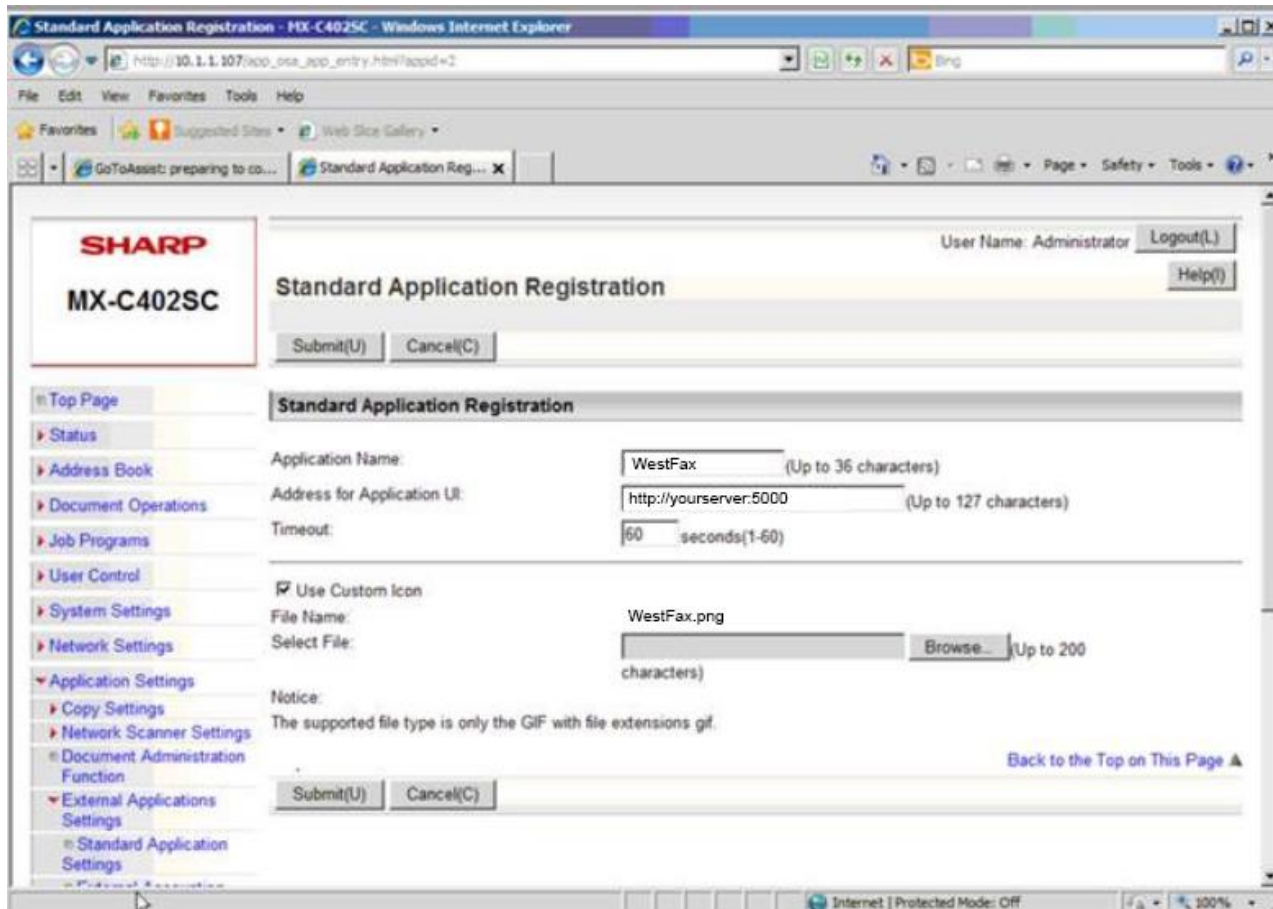
If there is an **Extended Platform** checkbox, check it.

You can use the WestFax icon as well by uploading it.

We have an icon you can use at <https://westfax.com/img/westfax.png> or for GIF <https://westfax.com/img/westfax.gif>

Click **Submit(U)**.

**You will have to reboot your device for these changes to take effect.**



- Sharp OSA Settings
- Standard Application Settings**
- External Accounting Application Settings
- Embedded Application Settings
- Polling Setting
- Settings
- Polling Setting

## Standard Application Registration

[Submit\(U\)](#) [Cancel\(C\)](#)

[Back to Menu List](#)

### Standard Application Registration

Application Name:  (Up to 36 characters)

Address for Application UI:  (Up to 127 characters)

Timeout:  seconds(1-60)

Browser:

Extended Platform

Data Size:

Use Custom Icon

File Name:

Select File:  [Browse](#)

[Top of Page](#)

- Sharp OSA Settings
- Condition Settings
- Standard Application Settings**
- External Accounting Application Settings
- Embedded Application Settings
- Embedded Application Settings
- Polling Setting
- Application Portal Settings
- External Service Connect

## Standard Application Registration

[Submit\(U\)](#) [Cancel\(C\)](#)

[Back to Menu List](#)

### Standard Application Registration

Application Name:  (Up to 36 characters)

Address for Application UI:  (Up to 127 characters)

Data Size:

Use Custom Icon

File Name:

Select File:  [Browse](#)

(Up to 200 characters)

Notice:  
The supported file types:JPEG with file extensions jpeg, jpg, jpe and jfif. GIF with file extensions gif. PNG with file extensions png.

[Submit\(U\)](#) [Cancel\(C\)](#)

[Top of Page](#)



## Using the WestFax OSA on your device

You will see the WestFax OSA Application on the screen. It will look something like this if you follow our installation guidelines and use the icon file we provided:



A screen like this will flash up before switching to the default fax settings page.





After this loading page transitions, you will see the following screen:

The screenshot shows a software interface for sending faxes. It features a list of numbers on the left, a set of control buttons (Add, Contacts, Delete, Clear), input fields for subject and email, and a prominent 'START' button.

The White Box on the left will have the numbers you want to call.

**Add Fax Number:** This brings up a number pad for direct fax number entry into the dialing list.

**Contacts:** This brings up the WestFax Address book (If enabled in setup) for rapid number selection.

**Delete Fax Number:** This removes the selected number (on the left) from the dialing list.

**Clear Fax Numbers:** This will remove all the numbers in the dialing list.

**Subject:** This is the Subject of the Fax. This is used on the portal and on the cover page.

**Confirmation Email:** This email address will receive the fax submission report.

**START:** This starts the fax job. It will scan your documents and send the fax.

## Number Entry and Contact Page.

This is the Number Entry page:

WestFax Add Fax Number Back

1	2	3
4	5	6
7	8	9
Backspace	0	Clear

Add Fax Number

Just enter the 10 digit fax number and click “Add Fax Number” to add the number. Do not enter 9 to dial out as we do not process faxes that have a “9” prefix.

This is the Contacts Entry page:

WestFax Contacts Back

Search Search for Contacts... Clear

Name	Company	Fax Number	Add
Test User	Acme, Corp	(111) 222-3333	+
Test User	Acme, Corp	(111) 222-3333	-
Test User	Acme, Corp	(111) 222-3333	-
Test User	Acme, Corp	(111) 222-3333	-
Test User	Acme, Corp	(111) 222-3333	-

Showing page 3 of 27

You can browse or search for your contact and click the + button on the right to select this contact as the destination of the fax job.

If you have any additional questions or need assistance, please reach out to us at [support@westfax.com](mailto:support@westfax.com)

