



Version 9.3
Lotus Notes Module Guide

Edition

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Chapter 1

Installing the Lotus Notes Module



Note This *RightFax Lotus Notes Module Guide* augments the *admin help* that accompanies the *RightFax Lotus Notes Module*. For information on topics not found in this guide, see the *admin help*.

The RightFax Lotus Notes Module provides inbound and outbound faxing via RightFax directly from the Notes client application. The RightFax Lotus Notes Module and the Notes client are installed on the RightFax server. Using the Notes client, the module logs on to the Domino server, routes incoming faxes as memos to Notes client mailboxes, and picks up fax-bound memos and delivers them to the RightFax server for conversion to fax format and transmission.

The RightFax Lotus Notes Module installs several RightFax-specific databases on the Domino server. One of these databases (Rf90sync.nsf or “EFM Sync”) is a mirror of the RightFax database. Because the RightFax database is stored on both servers, RightFax configuration and administration can be performed on either server and then updated periodically on the other.

To install and integrate RightFax with your Lotus Notes system, you need to complete the following basic steps:

1. Install the RightFax server (described in the *RightFax Installation Guide*).
2. Choose the type of integration you want for your RightFax and Notes system (described on [page 6](#)).
3. Activate the RightFax Lotus Notes Module (described on [page 8](#)).

4. Install or update the RightFax Lotus Notes Module and the installer database (described on [page 10](#)).
5. Use the installer database to install the database files for your RightFax integration (described later in this chapter).
6. Configure the RightFax server document in Notes (described in [Chapter 2, “Configuring the EFM Sync Database”](#)).
7. Configure the RightFax gateway document in Notes, establishing database synchronization between the RightFax and the Domino servers (described in [Chapter 2, “Configuring the EFM Sync Database”](#)).
8. Configure RightFax objects in Notes, such as cover sheets and billing codes (described in [Chapter 2, “Configuring the EFM Sync Database”](#)).
9. Configure users (described in [Chapter 2, “Configuring the EFM Sync Database”](#)).

Upgrading to RightFax 9.3 from another version

You may upgrade to RightFax 9.3 only from RightFax versions 8.7 or 9.0. If you are running an earlier version of the Lotus Notes Module, you must either uninstall the module and perform a new install of the 9.3 module, or upgrade your earlier version to version 8.7 and then upgrade to version 9.3. 8.7 installations must run the 9.0 upgrade followed by the 9.3 update.

Before performing any upgrades, create a full backup of the Notes databases for RightFax.



Caution If you left files in the temp directory after your last install, those files must be removed or a different temp directory specified during the install in order for the databases to be updated correctly.



Important After completing an upgrade from RightFax 8.7, you must check for the presence of the 8.7 EFMSync database (RF80Sync.NSF). If this file is present, it must be manually deleted or otherwise removed prior to starting the Notes Gateway and configuring the 9.3 EFMSync database.

Installation Logs

A set of installation logs files are available after completing the installation of the Notes databases. These logs can provide important installation details and can be used to troubleshoot installation errors. To view these logs, browse to the installation logs view that is available upon completing the installation of the Notes databases.

Understanding the Notes Integration Options



Note For iNotes to work in R6, the user must have an iNotes-enabled template. If you do not use full-mail integration (which uses an iNotes-enabled template), then only those users whose mail file is based on the iNotes6.ntf template can be configured for RightFax iNotes.

You have the following options for integrating faxing with RightFax in your Notes system. Instructions for each of these options are provided later in this chapter.

Table 1a RightFax Integration Options

Integration option	How users send faxes	Installation features
Full Notes Mail integration	A RightFax mail template for faxes allows Notes users to design and address memos and attachments as outbound faxes.	<p>Locally stores the Notes databases required by the module. The databases are moved to the Domino server by automated database copy and replication methods.</p> <p>Adds RightFax forms, subforms, and agents to the Notes mail template that you specify.</p> <p>All mail databases inheriting design from the modified mail template are granted outbound faxing capability.</p> <p>Fax documents are stored both in the RightFax application database and in the user's Notes mail database.</p>

Table 1a RightFax Integration Options (Continued)

Integration option	How users send faxes	Installation features
Minimal Notes Mail integration	A RightFax mail template for faxes allows Notes users to design and address memos and attachments as outbound faxes.	<p>Locally stores the Notes databases required by the module. These are moved to the Domino server by automated database copy and replication methods.</p> <p>Makes no modifications to any Notes mail template.</p> <p>Modifies each fax user's mail database.</p> <p>Locally installs a fax factory database where fax mechanics reside. For more information on the fax factory database, see "Understanding the fax factory" on page 15.</p>
No Mail integration	The standard Notes Memo form and RightFax embedded codes (that users type into the body of the memo) allow users to send memos as faxes.	<p>Locally stores the Notes databases required by the module. These are moved to the Domino server by automated database copy and replication methods.</p> <p>Makes no modifications to any Notes mail template or any users' mail databases.</p> <p>Fax documents are stored both in the RightFax database and in the user's Notes mail database.</p>

Faxing Notes Forms

For outbound faxes, you can specify that fax images are created using one or both of the following approaches:

- The fax image captures only the contents of the Notes form body field and ignores all other elements of the Notes form. Only the body of the message is faxed.
- The fax image captures the Notes form elements, including the *entire* underlying Notes form (such as headers, graphics, and tables).



Warning *If you will be sending faxes with the Notes form elements intact, do not customize the RightFax advanced fax form or customize the Notes memo form for faxing. The forms will not be processed by the module.*

To configure faxing the entire Notes form, complete the following steps:

- Install an HP LaserJet 4 print driver on the RightFax server.
- During the RightFax database installation, you have the option to select rendering the Notes body field only and rendering the entire Notes form. In the database installer, this is selected in the **Configure Fax Rendering Options** document. You can select both rendering methods. The database installation is described in this chapter.

Activating and Configuring the Lotus Notes Module

The files required by the RightFax Lotus Notes Module are installed on all RightFax servers during the server installation. However, the RightFax Lotus Notes Module must be licensed and activated before its functionality will be enabled.

To activate the RightFax Lotus Notes Module, you must have licensed a RightFax server type that includes this module, or purchased and licensed this module separately. For information on activating new components on the RightFax server, refer to the *RightFax Installation Guide*.

Before you begin

The RightFax Lotus Notes Module requires that your Domino server and client applications all be updated to a version between R5.0.11 and R6.5.1. Captaris recommends that your Domino server and RightFax server be located on separate computers.

Verify that the Lotus Notes client is installed on the RightFax server and has permissions to access any Domino servers that you want the module to access. The Notes client that is used to install RightFax must not be located on the Domino server. If you are installing to an R5 system, you must also have the Notes Designer installed on the RightFax server.

If you are running the Lotus Notes module in a clustered Domino server environment, note that faxes that are sent during a failover of the node used to install the RightFax gateway will sit in the MAIL.BOX of the node being used by the Notes clients. When the node used to install the RightFax Gateway is returned to service, those faxes will be processed according to your Domino Connections document configuration. Please see your Domino documentation for instructions on configuring your Connections document.

Additional Requirement

To utilize the RightFax integration with iNotes, all client workstations must have the Java Virtual Machine available from Sun Microsystems.

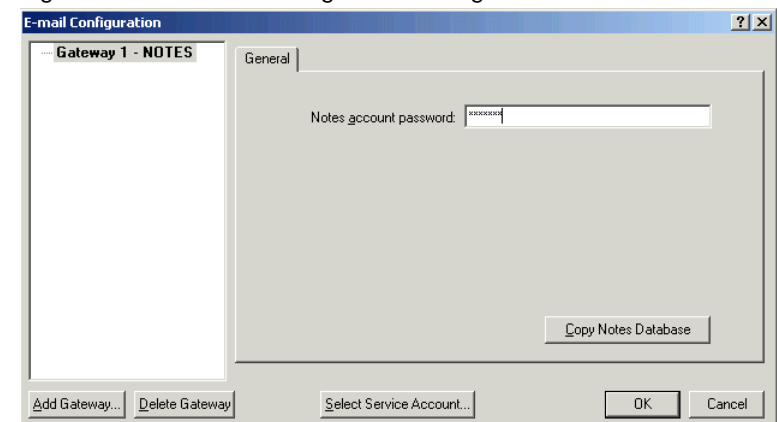
Adding and Configuring the Lotus Notes Module Service

After your RightFax server has had the RightFax Lotus Notes Module functionality enabled, open Windows Control Panel and run the E-mail Gateway configuration program. (If you already have one or more e-mail gateways configured, you can open the E-mail Gateway configuration program by double-clicking the RightFax E-mail Gateway service in Enterprise Fax Manager.)

To add a new gateway, click **Add Gateway**. Select **Lotus Notes** from the list of gateways and then click **Select**. Because RightFax allows you to install multiple e-mail gateways, each installed gateway is listed in the tree in the left pane. Click each gateway in the list to view its configuration options. Each e-mail gateway you add must be separately configured to work with your Notes server and your network environment.

When you add the gateway, the **E-mail Configuration** dialog box opens.

Figure 1.1 The E-mail Configuration Dialog Box



In the **Notes Account Password** box, type the password to the User.ID file on the Lotus Notes client that will be used by the gateway. Click **Copy Notes Database** to copy the INSTAL.NSF file from the RightFax server to the Notes server.

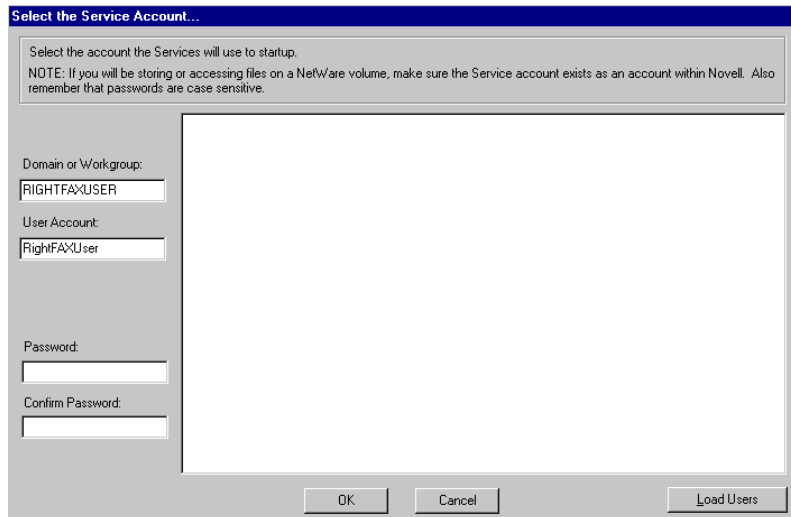
Next, use the installer database to install the RightFax databases in Notes using one of the following options:

- Full integration with Notes Mail (described on [page 9](#))
- Minimal integration with Notes Mail (described on [page 14](#))
- No integration with Notes Mail (described on [page 19](#))
- Extract the database files and install manually (described on [page 22](#))

Selecting a Service Account for Network Access

The RightFax Lotus Notes Module logs on to the network as a service using a Windows user account that you specify. To change the service account, run the e-mail gateway configuration program in Enterprise Fax Manager and click **Select Service Account**. This opens the **Select the Service Account** dialog box.

Figure 1.2 The Select the Service Account Dialog Box



Enter the new service account in the **Domain or Workgroup** and **User Account** boxes. The user account must have administrative rights on the RightFax server. You can also click **Load Users** to

browse for a user account on the network. Enter the password for the user account in the **Password** and **Confirm Password** boxes. The password is case-sensitive. Click **OK** to apply the new service account.

Starting and Stopping the Gateway Service

When you install the first e-mail gateway, a new service called the RightFax E-mail Gateway Module is created. This service is set to "Manual" and is started and stopped by the RightFax Server service. You can start and stop the RightFax E-mail Gateway Module service in Enterprise Fax Manager.



Note Logging on to the RightFax server with a Windows NT account that lacks full administrative permissions to the Domino server will cause the Notes gateway service to fail.

Installing the Databases for Full Notes Mail Integration

When you choose to install RightFax for full Notes Mail integration, the following features are enabled:

- A RightFax mail template for faxes allows Notes users to design and address memos and attachments as outbound faxes.
- A RightFax agent can return undeliverable faxes to the senders.
- Notes databases required by the module are stored locally on the client computer. The databases are moved to the Domino server by automated database copy and replication methods.
- RightFax forms, subforms, and agents are added to a Notes mail template that you specify.
- All mail databases inheriting design from the modified mail template are granted outbound faxing capability.
- Fax documents are stored both in the RightFax application database and in the user's Notes mail database.

The following configuration process updates all Notes mail users with fax capability. All Notes mail databases that inherit design from the standard Notes mail template will inherit fax capability and RightFax components.

If you want to select users who should receive fax capability, you can create a unique fax mail template for those users *before* installing the Lotus Notes gateway. For instructions, see “[Selecting users for fax capability](#)” on [page 13](#). If you want to select users for fax capability, this fax mail template *must* be created before installing the gateway.

Requirements

The person performing the configuration must have the following access rights:

- Designer in the ACL of the mail template to be modified.
- Editor in the ACL of the NAB.
- Ability to create both new and replica databases on the Domino server connecting to the module client.
- Ability to create and modify Group documents in the NAB.
- Ability to create and modify a fax foreign domain document in the NAB.
- Ability to run unrestricted Lotus Script and Java agents on the Domino server that will host the module databases.

Each fax user must have:

- Author access in the ACL of the RightFax EFM Sync database on the Domino server.
- Ability to connect to the Domino server EFM Sync database or store local replicas of it and their mail database.
- Lotus Notes Mail or higher license.

Install the databases

If you are performing a new install, follow the steps below. If you are upgrading to 9.3, follow the instructions on [page 12](#), “[Installing the 9.3 Update](#)”.

1. The database installation must be performed on a computer that has the Notes Client installed. This must *not* be either the RightFax server or the Domino server. Copy the file NGInstal.nsf in the \Notes\Data folder on the RightFax server to the same folder on the local computer.
2. Run the Notes client go to the workspace where RightFax will be installed.
3. Open the **RightFax 9.0 Installation Database**. The **About** document opens. If any security messages appear, select the option to trust the signer. Close the **About** screen.
4. Click **Begin/Resume Installation**. The **Welcome** screen opens. Click **Next**.
5. Follow the instructions on the **Stop the RightFax E-mail Gateway** document to stop the e-mail gateway, and then click **Next**.
6. On the **Define Installation Type** document, select **New Installation** and **Full Mail Integration**. Click **Next**.
7. On the **Define Lotus Client Configuration** document, select the Domino server version under **Server Information - RightFax**. Click **Next**.
8. On the **Define Lotus Server Configuration** document, type or select the organization and server names under **Domino server for RightFax components**. Click **Next**.
9. On the **Define Database Languages** document, select the language you want to install. Click **Next**.
10. If you are installing on a Domino R6 or higher server, the **Define iNotes Support** document opens. Select **Yes** if you want to enable RightFax functionality in iNotes. Click **Next**.

11. On the **Define Fax Administrative Person or Group** document, specify the user ID of person who should have Manager access to the EFM Sync database. Click **Next**.
12. On the **Define Fax Domain** document, specify the foreign domain through which the module will route outbound faxes. Click **Next**, and the **Configure Fax Rendering Options** document opens.
13. Select one or both of the following options.

Option	Description
Enable routing of faxes not containing Notes forms	Render outgoing faxes created in Lotus Notes by capturing only the contents of the Notes form body field and ignore all other elements of the Notes form (such as headers, graphics, and tables). RightFax supplements the Notes body field with any specified RightFax elements (such as overlay forms).
Enable routing of faxes containing Notes forms	Render outgoing faxes with the Notes form elements intact; capture the <i>entire</i> underlying Notes form (instead of the body only). When rendering the fax image, RightFax will convert <i>all</i> the captured data to a PCL (printer control language) file, retaining the Notes form elements. When you select this option, you must also specify a foreign domain that will route faxes that contain Notes forms.

Click **Next**, and the **Validate Access to the NAB or Domino Directory** document opens.

14. Verify that you have the permissions to continue this procedure, and then click **Next**. The **Define Notes Mail Template to Update** document opens.

15. Specify the Notes mail template to modify with RightFax components, its location, and the version of Notes for the template. Click **Next**, and the **Detach Temporary Files** document opens.
16. Click **Next** to detach all the files to a temporary folder. Alternatively, you can detach the files individually. To do so, select the check box **Display the attached core install files**. The files appear, and you can detach one at a time. To view a list of the files in the language you selected or to detach one of the language files individually, click **View Additional Install Files**.
17. Click **Next**, and the **Create New Server Database Replicas** document opens.
18. Click **Next** to create replicas of the databases on the RightFax server. The **Create Notes Mail Template Backup DB** document opens.
19. Click **Next** to create a backup copy of the Notes mail template that will be modified with RightFax components. The **Copy RightFax Components to Notes Mail Template DB** document opens.
20. Click **Next** to copy the faxing components from the RightFax mail template to the Notes mail template that was specified in an earlier step. The **Add Database Icons or Bookmarks** document opens.
21. Select **Yes** to add icons to the Notes Workspace, and then click **Next**. The **Delete Temporary Files** document opens.
22. Select **Delete the Temporary Files**, and then click **Next**. The **Migrate Current Data** document opens.
23. Select current data to migrate to this installation and then click **Next**.
24. If upgrading from 8.7, check for the file **RF80Sync.NSF**. If found, delete or rename.

25. Follow the instructions on the **Start the RightFax E-mail Gateway Service** document to start the e-mail gateway, and then click **Next**.
26. On the **Gateway Database Installation Completed** document, click **Next** to complete the installation.
27. Configure the gateway and RightFax objects by following the instructions in [Chapter 2, "Configuring the EFM Sync Database"](#).

Files installed by the database installer

The following databases are installed in Notes data folder on the Domino server.

Table 1b Files Installed by the Installer

Database	File name
RightFax 9.0 Admin Help	Rf90ahlp.nsf
RightFax 9.0 EFM Sync	Rf90sync.nsf
RightFax 9.0 User Help	Rf90uhlp.nsf
RightFax Control Database	Rfcontrl.nsf
RightFax ICD Router	Rf_icd.nsf
RightFax Mail Router	RightFax.nsf
RightFax Mail Router Forms (if Notes form rendering was selected)	Rfaxform.nsf

Installing the 9.3 Update

The instructions below outline the steps needed to update to the Notes Gateway to 9.3.



Warning *If you left files in the temp directory after your last installation, those files must be removed or a different temp directory specified during the install in order for the databases to be updated correctly.*



Note *In a clustered Notes environment, documents that are sent while a node is failed over are held in the MAIL.BOX of the server to which the client is connected. When the node on which the Notes Gateway is installed is returned to service, outbound messages are processed according to the settings on the Connections document.*

To ensure the previous version files are deleted during the upgrade when running the 9.00 installer and 9.3 installer back-to-back, you should take the following steps

Complete the 9.0 installer.

Close the Notes client from which the installer is being run.

On the Domino server console, type "dbcache flush." This will not delete any data, but will free up connections that are not currently in use but are still cached.

Re-open the Notes client and continue with the 9.3 Install.

Update the Full Notes Mail Integration to 9.3

1. Copy NGPatch.NSF from the \RightFax\Gateway folder on the RightFax server to the Notes client machine's \Lotus\Notes\Data folder. View the file properties of NGPatch.NSF on the Notes client machine and ensure that it is not set to read-only. If so, remove the read-only attribute.
2. Run the Lotus Notes client and open the RightFax 9.3 installer database file NGPatch.NSF.

3. Click the Begin/Resume Installation button. Complete the database installation according to the instructions found under the “Installing the Databases for Full Notes Mail Integration” section. Once completed, you must resend the connections document to all users.



Important 4. When you reach the step that specifies the path to the TEMP folder, ensure that the specified folder is empty, or select a different, empty folder.

Additional requirement when upgrading from Version 8.7

Because the name of the EFM Sync database file was changed between version 8.7 and 9.x, the administrator must resend the Connections document to each fax user in the EFM Sync database, after upgrading from version 8.7.

Selecting users for fax capability

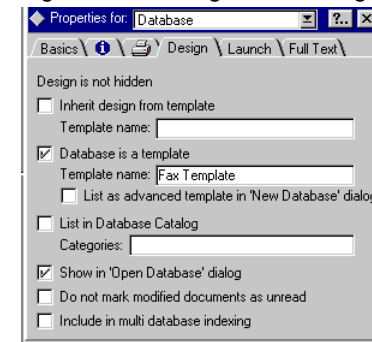
The full Notes Mail integration (page 9) updates all Notes mail users with fax capability. All Notes mail databases that inherit design from the standard Notes mail template will inherit fax capability and RightFax components.

If you want to select only specific users who should receive fax capability, you can create a separate mail template for them *before* installing the Lotus Notes Gateway, and then select that template during the installation.

To create a fax mail template

1. On the Domino server, create a *copy* of the standard Notes mail template. This copy is your new fax mail template. Do not create a replica, because modifications made to it will replicate to the original standard Notes template.
2. Add a design template name to the new fax template, as in this example.

Figure 1.3 Adding a New Design Template Name



3. For each Notes mail user who should have fax capability, modify the mail database properties to inherit the design from the new fax template.
4. Run the RightFax e-mail gateway installation. During the installation, select the fax template rather than the standard Notes mail template.
5. Distribute the new design to all Notes mail users who need fax capability. Use one of the following methods to distribute the design.

To update the design from the Domino server console window

1. At the command prompt, type:

```
load convert mail/*.nsf * mail6.ntf
```

or, if you are installing on an R5 version:

```
load convert mail/*.nsf * mail50.ntf
```

and press ENTER. Depending on the number of Notes mail users, the process may take several minutes. The process is complete when the prompt **Load Convert Utility Shutdown** appears.

2. Minimize the server console window and return to the Notes client workspace.

To update the design from the Notes client workspace running on the Domino server

1. From the Notes client workspace, on the **File** menu, select **Tools > Administration**.
2. Select the server to administer, and click **Console**. The **Remote Server Console** dialog box opens.
3. In the **Server console command** box, type "Load Design."
4. Select the **Live console** check box, and then click **Send**. The process is complete when the prompt **Database Designer Shutdown** appears.
5. Click **Done**, and then close the dialog box to return to the workspace.

Installing the Databases for Minimal Notes Mail Integration

When you choose to install RightFax for minimal Notes Mail integration, the following features are enabled:

- Users send and receive faxes from Notes using a local fax factory database, which contains the RightFax form. No modifications are made to any Notes mail template.
- Notes databases required by the module are stored locally on the client computer. The databases are moved to the Domino server by automated database copy and replication methods.
- Fax documents are stored both in the RightFax application database and in the user's Notes mail database.
- Fax users can compose and store outbound faxes while disconnected from the Domino server. When they next connect and replicate, these faxes are delivered.

The following configuration process modifies each fax user's mail database by adding an agent, a shared folder, and configuration documents, and it locally installs a fax factory database where fax mechanics reside. These are installed and updated by an automated setup document that is mailed by the fax administrator to each fax user.

Only those users who are mailed a setup document can send faxes.



Note *This method is not recommended for two or more users sharing the same Lotus Notes workspace. A local fax factory is built only for the mail user logged in to the workspace when the RightFax Connections document is activated. As with any Notes mail-enabled database, the fax factory is created with embedded mail user data and signed into the database by the Lotus Notes "sign with mail ID" process.*

Requirements

The person performing the configuration must have the following access rights:

- Editor in the ACL of the NAB.
- Ability to create both new and replica databases on the Domino server connecting to the client.
- Ability to create and modify Group documents in the NAB.
- Ability to create and modify a fax foreign domain document in the NAB.
- Ability to run unrestricted Lotus Script and Java agents on the Domino server that will host the module databases.

Each fax user must have:

- Reader access in the ACL of the RightFax EFM Sync database on the Domino server.
- Ability to connect to the Domino server EFM Sync database or store local replicas of it and their mail database.
- Lotus Notes Mail or higher license.

Understanding the fax factory



Note *The Connections document is stored in user's mail file. Users can edit the path for where they want the fax factory database stored on their local machines; they must do this before clicking Update in the Connections document during configuration.*

If you choose minimal Notes Mail integration, RightFax will install fax factory databases that improve the efficiency of the Domino server by moving fax composition tasks to the user's computer. A local fax factory database is installed on each client computer, and a central fax factory template database is installed on the Domino server.

The user's local fax factory database is kept up to date by inheriting its design from the fax factory template. This permits the fax administrator to update the user's fax factory when needed, rather than the Notes mail template.

User-specific data and fax preferences are stored in the User Options document in the EFM Sync database. When a user opens his personal User Options document in his Notes mail database, the current data is pulled into the document from the EFM Sync database. The User Options document is stored in the mail database and has a stored form so that modifications to the database design are not required. When the user saves changes, the data is updated in both the EFM Sync database and the local fax factory database.

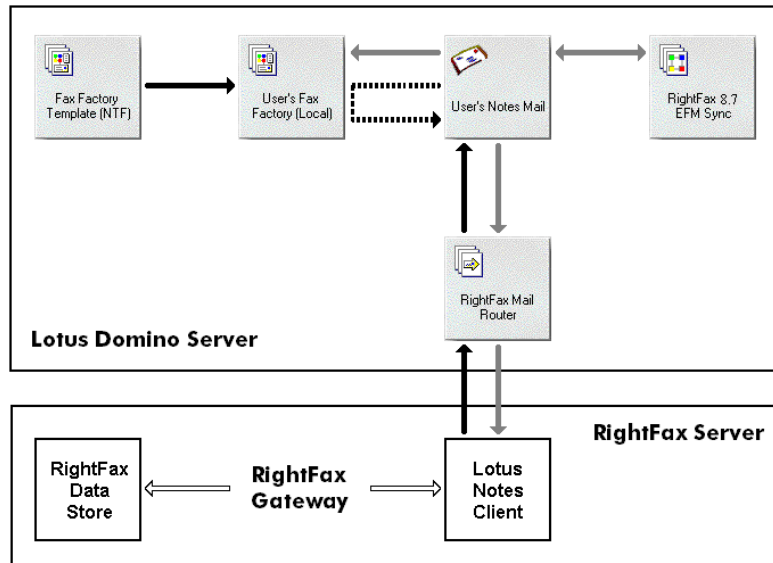
The user composes a fax by activating an agent stored in his mail database. The agent directs composition of the document to the local fax factory database. When saved or sent, the fax is stored in the user's mail database.

Outbound fax documents are delivered via standard Domino mail mechanisms to the database specified in the fax foreign domain document. Fax rendering and delivery out of the Domino environment are handled by the gateway service on the RightFax server. This frees Domino server resources for Lotus Notes and Domino tasks.

Inbound fax documents are processed by the Lotus Notes module on the RightFax server and stored in the RightFax Mail Router database. Faxes are passed from the RightFax Mail Router

database to the Domino router task for standard Notes mail delivery. Because delivery is the only task handled by the Domino server, fax traffic only impacts the Domino mail router task.

Figure 1.4 Fax Data Flow



Install the databases

If you are performing a new install, follow the steps below. If you are upgrading to 9.3, follow the instructions on page 16 "[Installing the 9.3 Update](#)".

1. The database installation must be performed on a computer that has the Notes Client installed. This must *not* be either the RightFax server or the Domino server. Copy the file NGInstal.nsf in the \Notes\Data folder on the RightFax server to the same folder on the local computer.
2. Run the Notes client go to the workspace where RightFax will be installed.
3. Open the **RightFax 9.0 Installation Database**. The **About** document opens. If any security messages appear, select the option to trust the signer. Close the **About** screen.
4. Click **Begin/Resume Installation**. The **Welcome** screen opens. Click **Next**.
5. Follow the instructions on the **Stop the RightFax E-mail Gateway** document to stop the e-mail gateway, and then click **Next**.
6. On the **Define Installation Type** document, select **New Installation** and **Minimal Mail Integration**. Click **Next**.
7. On the **Define Lotus Client Configuration** document, select the Domino server version under **Server Information - RightFax**. Click **Next**.
8. On the **Define Lotus Server Configuration** document, type or select the organization and server names under **Domino server for RightFax components**. Click **Next**.
9. On the **Define Database Languages** document, select the language you want to install. Click **Next**.
10. If you are installing on a Domino R6 or higher server, the **Define iNotes Support** document opens. Select **Yes** if you want to enable RightFax functionality in iNotes. Click **Next**.
11. On the **Define Fax Administrative Person or Group** document, specify the user ID of person who should have Manager access to the EFM Sync database. Click **Next**.
12. On the **Define Fax Domain** document, specify the foreign domain through which the module will route outbound faxes. Click **Next**.

13. On the **Configure Fax Rendering Options** document, select one or both of the following options.

Option	Description
Enable routing of faxes not containing Notes forms	Render outgoing faxes created in Lotus Notes by capturing only the contents of the Notes form body field and ignore all other elements of the Notes form (such as headers, graphics, and tables). RightFax supplements the Notes body field with any specified RightFax elements (such as overlay forms).
Enable routing of faxes containing Notes forms	Render outgoing faxes with the Notes form elements intact; capture the <i>entire</i> underlying Notes form (instead of the body only). When rendering the fax image, RightFax will convert <i>all</i> the captured data to a PCL (printer control language) file, retaining the Notes form elements. When you select this option, you must also specify a foreign domain that will route faxes that contain Notes forms.

Click **Next**.

14. On the **Validate Access to the NAB or Domino Directory** document, verify that you have the permissions to continue this procedure. Click **Next**, and the **Detach Temporary Files** document opens.

15. Click **Next** to detach all the files to a temporary folder. Alternatively, you can detach the files individually. To do so, select the check box **Display the attached core install files**. The files appear, and you can detach one at a time. To view a list of the files in the language you selected or to detach one of the language files individually, click **View Additional Install Files**.

16. Click **Next**, and the **Create New Server Database Replicas** document opens.

17. Click **Next** to create replicas of the databases on the RightFax server. The **Add Database Icons or Bookmarks** document opens.

18. Select **Yes** to add icons to the Notes Workspace, and then click **Next**.

19. On the **Delete Temporary Files** document, select **Delete the Temporary Files**, and then click **Next**.

20. On the **Migrate Current Data** document, select current data to migrate to this installation and then click **Next**.

21. If upgrading from 8.7, check for the file **RF80Sync.NSF**. If found, delete or rename.

22. Follow the instructions on the **Start the RightFax E-mail Gateway Service** document to start the e-mail gateway, and then click **Next**.

23. On the **Gateway Database Installation Completed** document, click **Next** to complete the installation.

24. Configure the gateway and RightFax objects by following the instructions in [Chapter 2, "Configuring the EFM Sync Database"](#).

Installing the 9.3 Update

The instructions below outline the steps needed to update to the Notes Gateway to 9.3.



Warning If you left files in the temp directory after your last installation, those files must be removed or a different temp directory specified during the install in order for the databases to be updated correctly.



Note In a clustered Notes environment, documents that are sent while a node is failed over are held in the MAIL.BOX of the server to which the client is connected. When the node on which the Notes Gateway is installed is returned to service, outbound messages are processed according to the settings on the Connections document.

To ensure the previous version files are deleted during the upgrade when running the 9.00 installer and 9.3 installer back-to-back, you should take the following steps

Complete the 9.0 installer.

Close the Notes client from which the installer is being run.

On the Domino server console, type “dbcache flush.” This will not delete any data, but will free up connections that are not currently in use but are still cached.

Re-open the Notes client and continue with the 9.3 Install.

Update the Minimal Notes Mail Integration to 9.3

1. Copy NGPatch.NSF from the \RightFax\Gateway folder on the RightFax server to the Notes client machine's \Lotus\Notes\Data folder. View the file properties of NGPatch.NSF on the Notes client machine and ensure that it is not set to read-only. If so, remove the read-only attribute.
2. Run the Lotus Notes client and open the RightFax 9.3 installer database file NGPatch.NSF.

3. Click the Begin/Resume Installation button. Complete the database installation according to the instructions found under the “[Installing the Databases for Minimal Notes Mail Integration](#)” section, but do not make any changes to the existing configuration settings. Once the install is completed, you must resend the connections document to those using whom will utilize RightFax mail file design elements.



Important When you reach the step that specifies the path to the TEMP folder, ensure that the specified folder is empty, or specify a different, empty folder

4. After completing step 10 in the installation, view the install log by clicking the button in the top left of the Installer window, and confirm that the previous install files were successfully deleted. If not, you must manually delete these files before continuing with the installation.
5. Re-send the Connections document to each person listed in the EFM Sync database.
6. Instruct each user to run the Update from their mail file to download the updated Fax Factory, and then open the User Options document from within the Fax Factory database and Save and Close the document to update the remaining mail elements.

Files installed by the database installer

The following database files are installed in the \Notes\Data\RightFax folder on the Domino server.

Table 1c Files Installed by the Installer

Database	File name
RightFax 9.0 Admin Help	Rf90ahlp.nsf
RightFax 9.0 EFM Sync	Rf90sync.nsf
RightFax 9.0 User Help	Rf90uhlp.nsf

Table 1c Files Installed by the Installer (Continued)

Database	File name
RightFax Control Database	Rfcontrl.nsf
RightFax Fax Factory	Rfactory.ntf
RightFax ICD Router	Rf_icd.nsf
RightFax Mail Router	RightFax.nsf
RightFax Mail Router Forms (if Notes form rendering was selected)	Rfaxform.nsf

Installing the Databases for No Notes Mail Integration

When you choose to install RightFax with no Notes Mail integration, the following features are enabled:

- Users send and received faxes using the standard Notes Memo form and RightFax embedded codes that users must manually enter into the body of the memo.
- Notes databases required by the module are stored locally. These are moved to the Domino server by automated database copy and replication methods.
- No modifications to any Notes mail template or any users' mail databases are made.
- Fax documents are stored both in the RightFax database and in the user's Notes mail database.

Requirements

The person performing the configuration must have the following access rights:

- Editor in the ACL of the NAB.
- Ability to create both new and replica databases on the Domino server connecting to the client.
- Ability to create and modify Group documents in the NAB.
- Ability to create and modify a fax foreign domain document in the NAB.
- Ability to run unrestricted Lotus Script and Java agents on the Domino server that will host the module databases.

Each fax user must have:

- An active connection to the Domino server that will host the Lotus Notes module databases.
- Lotus Notes Mail or higher license.

Install the databases

If you are performing a new install, follow the steps below. If you are upgrading to 9.3, follow the instructions on page 20 "[Installing the 9.3 Update](#)".

1. The database installation must be performed on a computer that has the Notes Client installed. This must *not* be either the RightFax server or the Domino server. Copy the file NGInstal.nsf in the \Notes\Data folder on the RightFax server to the same folder on the local computer.
2. Run the Notes client go to the workspace where RightFax will be installed.
3. Open the **RightFax 9.0 Installation Database**. The **About** document opens. If any security messages appear, select the option to trust the signer. Close the **About** screen.
4. Click **Begin/Resume Installation**. The **Welcome** screen opens. Click **Next**.

5. Follow the instructions on the **Stop the RightFax E-mail Gateway** document to stop the e-mail gateway, and then click **Next**.
6. On the **Define Installation Type** document, select **New Installation** and **No Mail Integration**. Click **Next**.
7. On the **Define Lotus Client Configuration** document, select the Domino server version under **Server Information - RightFax**. Click **Next**.
8. On the **Define Lotus Server Configuration** document, type or select the organization and server names under **Domino server for RightFax components**. Click **Next**.
9. On the **Define Database Languages** document, select the language you want to install. Click **Next**.
10. On the **Define Fax Administrative Person or Group** document, specify the user ID of person who should have Manager access to the EFM Sync database. Click **Next**.
11. On the **Define Fax Domain** document, specify the foreign domain through which the module will route outbound faxes. Click **Next**.

12. On the **Configure Fax Rendering Options** document, select one or both of the following options.

Option	Description
Enable routing of faxes not containing Notes forms	Render outgoing faxes created in Lotus Notes by capturing only the contents of the Notes form body field and ignore all other elements of the Notes form (such as headers, graphics, and tables). RightFax supplements the Notes body field with any specified RightFax elements (such as overlay forms).
Enable routing of faxes containing Notes forms	Render outgoing faxes with the Notes form elements intact; capture the <i>entire</i> underlying Notes form (instead of the body only). When rendering the fax image, RightFax will convert <i>all</i> the captured data to a PCL (printer control language) file, retaining the Notes form elements. When you select this option, you must also specify a foreign domain that will route faxes that contain Notes forms.

Click **Next**.

13. On the **Validate Access to the NAB or Domino Directory** document, verify that you have the permissions to continue this procedure. Click **Next**, and the **Detach Temporary Files** document opens.
14. Click **Next** to detach all the files to a temporary folder. Alternatively, you can detach the files individually. To do so, select the check box **Display the attached core install files**. The files appear, and you can detach one at a time. To view a list of the files in the language you selected or to detach one of the language files individually, click **View Additional Install Files**.

15. Click **Next**, and the **Create New Server Database Replicas** document opens.
16. Click **Next** to create replicas of the databases on the RightFax server. The **Add Database Icons or Bookmarks** document opens.
17. Select **Yes** to add icons to the Notes Workspace, and then click **Next**.
18. On the **Delete Temporary Files** document, select **Delete the Temporary Files**, and then click **Next**.
19. On the **Migrate Current Data** document, select current data to migrate to this installation and then click **Next**.
20. If upgrading from 8.7, check for the file **RF80Sync.NSF**. If found, delete or rename.
21. Follow the instructions on the **Start the RightFax E-mail Gateway Service** document to start the e-mail gateway, and then click **Next**.
22. On the **Gateway Database Installation Completed** document, click **Next** to complete the installation.
23. Configure the gateway and RightFax objects by following the instructions in [Chapter 2, "Configuring the EFM Sync Database"](#).

Installing the 9.3 Update

The instructions below outline the steps needed to update to the Notes Gateway to 9.3.



Warning *If you left files in the temp directory after your last installation, those files must be removed or a different temp directory specified during the install in order for the databases to be updated correctly.*



Note *In a clustered Notes environment, documents that are sent while a node is failed over are held in the MAIL.BOX of the server to which the client is connected. When the node on which the Notes Gateway is installed is returned to service, outbound messages are processed according to the settings on the Connections document.*

To ensure the previous version files are deleted during the upgrade when running the 9.00 installer and 9.3 installer back-to-back, you should take the following steps

Complete the 9.0 installer.

Close the Notes client from which the installer is being run.

On the Domino server console, type "dbcache flush." This will not delete any data, but will free up connections that are not currently in use but are still cached.

Re-open the Notes client and continue with the 9.3 Install.

Update the No Notes Mail Integration to 9.3

1. Copy NGPatch.NSF from the \RightFax\Gateway folder on the RightFax server to the Notes client machine's \Lotus\Notes\Data folder. View the file properties of NGPatch.NSF on the Notes client machine and ensure that it is not set to read-only. If so, remove the read-only attribute.
2. Run the Lotus Notes client and open the RightFax 9.3 installer database file NGPatch.NSF.

- Click the Begin/Resume Installation button. Complete the database installation according to the instructions found under the “[Installing the Databases for No Notes Mail Integration](#)” section.



Important When you reach the step that specifies the path to the TEMP folder, ensure that the specified folder is empty, or select a different, empty folder.

Files installed by the database installer

The following database files are installed in the \Notes\Data\RightFax folder on the Domino server.

Table 1d Files Installed by the Installer

Database	File name
RightFax 9.0 Admin Help	Rf90ahlp.nsf
RightFax 9.0 EFM Sync	Rf90sync.nsf
RightFax 9.0 User Help	Rf90uhlp.nsf
RightFax Control Database	Rfcontrl.nsf
RightFax Fax Factory	Rfactory.ntf
RightFax ICD Router	Rf_icd.nsf
RightFax Mail Router	RightFax.nsf
RightFax Mail Router Forms (if Notes form rendering was selected)	Rfaxform.nsf

Using RightFax Data Sharing with Lotus Notes

RightFax Data Sharing can be used in a Lotus environment provided the following conditions are met.

- Only one RightFax server can be enabled for Lotus client print processing.
- If synchronizing from Notes to RightFax using multiple EFMSync databases, each EFMSync database must be configured to use the RightFax shared data folders.
- If synchronizing from RightFax to Notes, only one EFMSync database can be configured for synchronization.

Configuring the EFMSync database to use the RightFax shared data folders

- Log in to the EFMSync database using a Notes ID with **Administrative Access**.
- Double-click a listed server to open the **Fax Server** document.
- Click **Edit Fax Server**.
- Under **Fax Server Directories**, paths and data folders on the RightFax server appear.
- Edit each of the paths to reflect the RightFax shared data folders.
- Repeat these steps for each EFMSync database in our organization.

Extracting the Install Databases to Prepare for Manual Installation

If you prefer to install the databases manually, you can extract the Notes databases required by the module.

For instructions, refer to the RightFax customer support Web site at www.captaris.com/knowledgebase.

Handling Undeliverable Faxes

If you have installed the *full* Notes Mail integration with RightFax, you can configure Notes to return undeliverable faxes to the senders.

If a fax reaches the RightFax server and the server can't deliver the fax, RightFax generates a fax failure notification. However, if a fax sent from Notes can't be delivered to the RightFax server, the sender won't get notification of the failure. You can configure Notes to return undeliverable faxes to the senders. To do this, you activate an agent in the RightFax Mail Router database.

For each undeliverable fax, the agent creates a "Fax Delivery Failure" report. The agent then mails the report to the fax sender so that the fax can be re-addressed and sent.

To configure the "Handle Undeliverable Faxes" agent

1. Open the **RightFax Mail Router** database.
2. In the **Agents** view, edit the agent **Handle Undeliverable Faxes**.
3. Change the value of **When should this agent run** from **On Schedule Never** to **On Schedule <xxx>**, where <xxx> is the interval at which you would like log maintenance to occur. For Notes version 5.0.11 and later, the recommended setting is "On Schedule More Than Once A Day."
4. Click **Schedule** to further define the log maintenance interval. For Notes version 5.0.11 and later, the recommended setting is 15 minutes or less. (Do not set the interval to 0 hours 0 minutes. This setting disables the agent.)

Schedule the agent so that fax senders will be notified of their undeliverable faxes within a reasonable interval.

5. Save and close the agent. This will re-sign the agent with your signature so that it will run within your organization.

6. In the **Agents** view, select the check box to the left of the **Handle Undeliverable Faxes** agent to enable it.

If this message appears: "Unable to determine the execution access privileges for this agent on <xxx>; agent may not run," then you may not have the appropriate rights to execute the agent. Refer to the online help for administrators in Notes for more information on scheduled agents.

Uninstalling the Module

To uninstall the Lotus Notes module and databases, complete the following steps:

1. On the RightFax server, run Enterprise Fax Manager and double-click the RightFax E-mail Gateway service. The **E-mail Configuration** dialog box opens.
2. Select the gateway to remove, and click **Delete Gateway**.
3. Remove all gateway functionality from the Domino server. For instructions, refer to the RightFax customer support Web site at www.captaris.com/knowledgebase.

■ ■ ■

Chapter 2

Configuring the EFM Sync Database

When the module is first installed, the RightFax database is replicated on the Domino server. This mirrored RightFax database, known as “EFM Sync,” lets Notes administrators access and modify RightFax settings from Notes. Database synchronization periodically updates the RightFax or Domino server with the data and configurations from the other.

EFM Sync contains the following information:

- RightFax server and synchronization information
- RightFax e-mail gateway information
- RightFax users and user groups, billing codes, cover sheets, overlay forms, and library documents.
- Fax printers
- Status reports of the RightFax server and the e-mail gateway
- Logs of sent and received faxes processed on the RightFax server
- RightFax agents

The interprocess communication document (ICD) is a small document that is generated when any of the module’s “on-demand” functions are activated. The ICD is delivered to the RightFax ICD Router database, where the module collects it. The module performs immediate action to fulfill the instructions contained in the ICD. For example, ICD processing allows immediate, on demand database synchronization.

After you have installed the RightFax database files (described in [Chapter 1, “Installing the Lotus Notes Module”](#)), you configure the EFM Sync database to meet your needs. You should complete the following basic steps:

1. Verify that you have access to EFM Sync (described on [page 26](#)).
2. Configure the RightFax server document in Notes, establishing database synchronization between the RightFax and the Domino servers (described on [page 26](#)).
3. Configure the RightFax gateway document in Notes (described on [page 30](#)).
4. Configure RightFax objects in Notes, such as cover sheets and billing codes (described on [page 37](#)).
5. Configure default user settings and import users from the Notes address book (described on [page 37](#)).
6. If needed, configure users to receive e-mail notifications of received faxes via Notes (described on [page 41](#)).

Understanding EFM Sync Database Security

When a user with fax administrative rights exists in EFM Sync, it overrides the Access Control Lists (ACLs). Thus, if you are going to synchronize from RightFax to Lotus Notes, you must update the Connections document and Default User first, and then the Fax Server document. If you don't perform these tasks in this order, you can lock yourself out if the user is not an administrator on the RightFax server.

When the RightFax module is installed, you are prompted for the user or group to have administrative rights. This user/group is put in ACLs associated with all of the module's Lotus Notes databases. This group maintains Manager access over all databases. Although the group's name is defined during the installation process, qualified RightFax administrators can rename it if the need arises.

During the initial module installation, the person logged on to Notes for the installation is assigned Notes Manager access rights to EFM Sync. This person must log on in order to complete the installation or to assign Manager access to other users.

RightFax administrators can only make changes to the EFM Sync database.

During the module installation (described in [Chapter 1, "Installing the Lotus Notes Module"](#)), a RightFax administrative group is created in the Notes Public Address Book. Any Notes users in the RightFax administrative group can grant or deny access to other users. Add or remove Notes users to this group to grant or deny access to EFM Sync. Members of this group must have Notes Manager access rights to EFM Sync.

To make changes to the EFM Sync database, members of this group must also be assigned administrative rights in RightFax. To create RightFax administrators, see ["Creating RightFax administrators"](#) on [page 40](#).

Configuring the RightFax Server

When you install the RightFax databases, server information is specified in the Fax Server document in the EFM Sync database.

Understanding database synchronization

The RightFax Lotus Notes Module synchronizes the Notes and RightFax databases. When the module is first installed, the RightFax database is replicated on the Domino server. This mirrored RightFax database, known as "EFM Sync," lets Notes users access and modify RightFax settings and configuration options from directly within Notes. Database synchronization periodically updates either the RightFax or the Domino server with the database configuration from the other.

Synchronization is one directional: RightFax-to-Notes or Notes-to-RightFax. During synchronization, new documents and changes to existing documents are copied from the source server to the destination server, but data is never copied back from the destination server to the source server.



Warning After synchronization is set up, modifications to RightFax database settings should be made on the source database only (the database on the Domino server, by default). Changes made on the destination server will be overwritten the next time synchronization occurs.

The EFM Sync database can be configured for full or selective replication. Full replication maintains a mirrored replica of the database across two or more servers. Selective replication is most often used to maintain a local replica of the database, such as on a laptop. The EFM Sync database is installed with full database replication, and you can enable selective replication. To enable selective replication, see ["Managing database replication"](#) on [page 29](#).

Because a large part of the database consists of logs of gateway server operations, you can control the size of the database by managing the logs. You can:

- Limit the amount of information recorded in the logs.
- Limit the number of log documents to save.
- Limit the age of log documents to save.

You also can increase the size limit of the database. To manage the log documents, refer to the topics on managing logs in the online help for RightFax administrators in Notes.

Enabling database synchronization

When you first install the Lotus Notes Module, all database synchronization is disabled. Only Notes users with Manager access to the EFM Sync database can enable or disable synchronization.

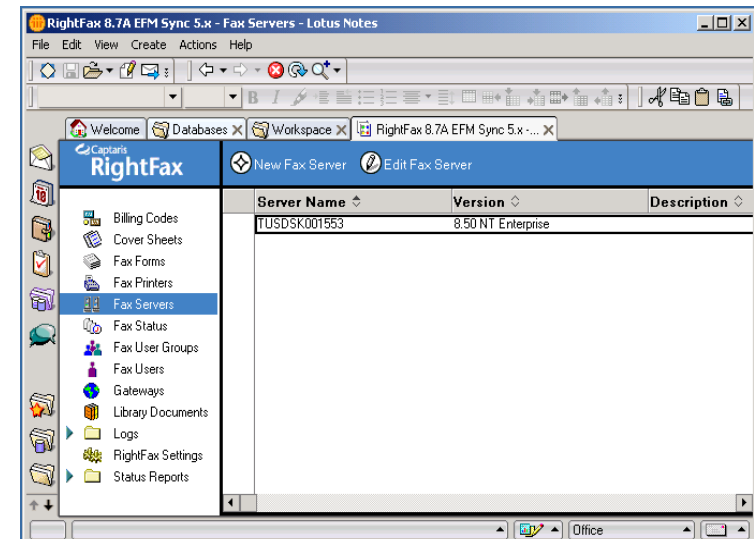
RightFax recommends that you enable synchronization after you:

1. Evaluate the database objects that you will maintain in RightFax or in EFM Sync (such as users and billing codes).
2. Define the data in RightFax or in EFM Sync.
3. Determine the synchronization path for each object (from RightFax to EFM Sync, or from EFM Sync to RightFax).

To configure the server document

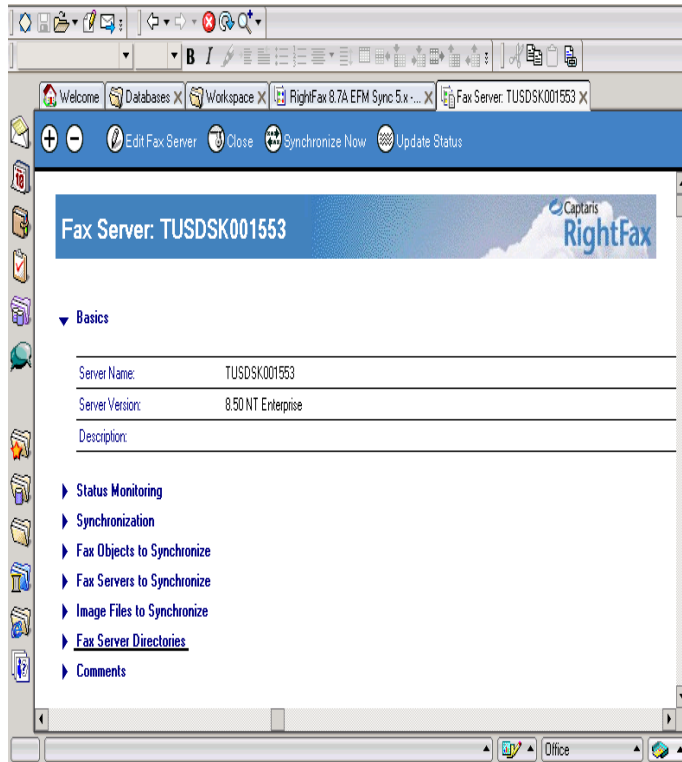
1. In Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view. Open the **Fax Servers** view. A list of your RightFax servers appears in the view.

Figure 2.1 The EFM Sync Fax Servers List



2. Double-click a listed server to open the Fax Server document. Click **Edit Fax Server**.

Figure 2.2 The Fax Server Document



3. Under **Basics**, the server name and version appear.

Table 2a Fax Server Information

Field	Setting
Synchronization	Select the check box to enable synchronization.
Synchronization Interval	Enter the frequency you want synchronization between the Domino and RightFax servers to occur. A setting of eight hours is recommended.
Synchronization Logging	Specify the level of information that will be written to the Synchronization Log: None. Records the date and time of the synchronization and the result. Terse (recommended). Records the success or failure of the synchronization process. Normal. Records details that make it useful to the average RightFax user. Verbose. Records details that make it useful to the RightFax administrator. Debug. Records all details. This option dramatically increases the size of the EFM Sync database. Select this option if you are initially testing the synchronization, if you are experiencing synchronization failures, or if you require details significant to a RightFax customer support engineer. For a description of the log, see “RightFax Event Logs” on page 45.
Synchronization Prescan Agent	The name of any Lotus Notes agent that should run prior to the synchronization.

Table 2a Fax Server Information (Continued)

Field	Setting
Synchronization Postscan Agent	The name of any Lotus Notes agent that should run following the synchronization. The default is "Initialize User Notes ID from User Name." This assures that new fax users added to the EFM Sync database from RightFax are given Notes IDs in their fax user documents. The IDs are based on the User Name field in the fax user document, e.g., John Smith = JOHN_SMITH.
Status Monitoring	Select the check box to enable writing fax server status documents in the EFM Sync database.
Status Interval	The amount of time between the end of one status monitoring cycle and the beginning of the next. The status monitoring feature continually overwrites one status document. This means that you can set a very short interval without risk of the database size reaching its quota. The recommended setting is 60 seconds.

4. Under **Fax Objects to Synchronize**, enable each RightFax object that you want to synchronize. For each object enabled, specify the synchronization method: RightFax to Notes or Notes to RightFax. Note that **Pager Services** is a one-way synchronization that provides the list of pager services available for Pager Notifications and Administrator Paging settings.
5. Under **Fax Servers to Synchronize**, specify the RightFax servers to which you want to synchronize each RightFax object. Note that **Pager Services** is a one-way synchronization that provides the list of pager services available for Pager Notifications and Administrator Paging settings.
6. Under **Image Files to Synchronize**, specify whether you want to synchronize the cover sheet and library document image files *in addition* to the object IDs. This will copy the cover sheet or library document files from the RightFax server to the Domino server during synchronization. If you select either of these options, you must also specify a folder on the Domino server in which to store the files.
7. Under **Fax Server Directories**, paths and data folders on the RightFax server appear.
8. Under **Comments**, enter any comments you may need as documentation.
9. Click **Save and Close** to save your synchronization settings and return to the EFM Sync database.

Managing database replication

The EFM Sync database can be configured for full or selective replication. Full replication maintains a mirrored replica of the database across two or more servers. Selective replication is most often used to maintain a local replica of the database, such as on a laptop.

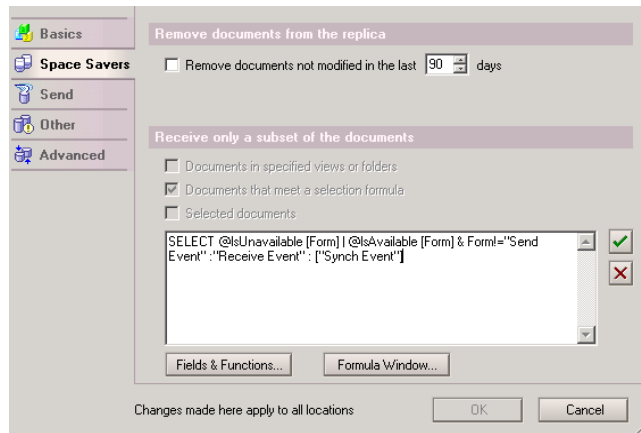
Selective replication limits the amount of disk space required for the database, and the replication sessions can be kept short. A selective replication is smaller because it excludes log documents.

The EFM Sync database is installed with full database replication, and you can enable selective replication.

To enable selective database replication

1. In Notes, right-click the **EFM Sync** icon to open a shortcut menu.
2. In Notes 4.x, select **Replication Settings**. In Notes 5.x, select **Replication**, and then **Settings**. The **Replication Settings** dialog box opens with the **Space Savers** settings in view. In Notes 6.x, select **Replication** from the **File** menu, then **New Replica**. The **Create Replica** dialog box opens.
3. In Notes 4.x and 5.x, select the check box **Replicate a subset of documents**. Select the check box **Select by formula**. In Notes 6.x, click **More Settings**, then select **Space Saver**, and select the check box for **Documents that meet a selection formula**.
4. In the formula window create the following formula:
`SELECT @IsUnavailable (Form) | (@IsAvailable (Form) & Form != "Send Event" : "Receive Event" : "Sync Event")`

Figure 2.3 EFM Sync Replication Settings (Notes 6.x)



This formula excludes all log documents from replication. You can specify the documents you want to exclude from the replication.

5. Click **OK** to save the settings.

Configuring the RightFax Gateway Document

The RightFax e-mail gateway for Lotus Notes monitors the RightFax mail router database for outgoing faxes and interprocessing communication documents (known as “ICD documents”). In return, the RightFax mail router monitors the Notes mail server for faxes and ICD documents.

ICD processing allows immediate, on-demand database synchronization.

Understanding ICD processing

The interprocess communication document (ICD) is a small document that is generated when any of the gateway “on-demand” functions are activated. The ICD is delivered to the RightFax ICD Router database, where the gateway collects it. The gateway performs immediate action to fulfill the instructions contained in the ICD.

For example, the Process Outbound action in the gateway document will process outbound fax documents regularly according to the configured interval. However, there may be times when it is crucial that the outbound faxes collected in the RightFax Mail Router database be processed as quickly as possible. Invoking the Process Outbound action composes an ICD with instructions commanding the gateway to process all outbound faxes. The ICD is delivered to the RightFax ICD Router database via Domino mail. The gateway collects the ICD, reads the instruction, and runs the outbound processes. Finally, the gateway resets the interval clock so that outbound documents will be processed next at the end of the configured interval.

Be aware that, as with all gateway processes, the ICD process has an interval between when it completes its last task and when it scans the ICD Router database for new ICD messages. For example, an on-demand action such as Process Outbound causes the sequence of events in the following example.

Assume that the interval for ICD processing is 45 seconds and the interval for processing outbound faxes is one minute.

1. A user selects Process Outbound from within the Gateway document in the EFM Sync database.
2. An ICD with the instruction Process: Outbound is created in the background by LotusScript.
3. The ICD is mailed to the ICD Router database.
4. When the ICD processing interval clock has counted down to 0, the gateway scans the ICD Router database.
5. The gateway finds the ICD.
6. The gateway processes the ICD by scanning the RightFax Mail Router database for outbound documents.
7. Any documents found are delivered out of Domino to the RightFax server.
8. The outbound fax processing interval is reset to one minute and begins counting down to 0.
9. The ICD processing interval clock is reset to 45 seconds and begins counting down to 0.

In this example there is a potential lag of up to 45 seconds between the time when the Process Outbound action is invoked and the time when the ICD is read and outbound faxes are processed. For this reason, it is recommended that you configure ICD processing with a brief interval. Since ICDs are routed to a different database from regular fax traffic, the ICD processing task can require almost no time to complete when the ICD router is empty, so you can configure ICD processing for a shorter interval

than you might for other intensive fax processes. Even a setting of 15 seconds will not tax regular fax processes because for the majority of time the ICD router database will be empty.

Faxing Notes forms

For outbound faxes, you can specify that faxes images are created using one or both of the following approaches:

- The fax image captures only the contents of the Notes form body field and ignores all other elements of the Notes form (such as headers, graphics, and tables).
- The fax image captures the Notes form elements, including the *entire* underlying Notes form (instead of the body only).

If you will be sending faxes with the Notes form elements intact, do not customize the RightFax fax form or customize the Notes memo form for faxing.

To configure the gateway document

1. In Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view. Open the **Gateway** view. A list of your RightFax e-mail gateways appears in the view.
2. Double-click a listed gateway to open the Gateway document. Click **Edit Gateway**.
3. Under **Basics**, information about the e-mail gateway is provided by the gateway.

4. Under **Interprocess Communication Document Processing**, specify the following settings,

Table 2b Settings for ICD Processing

Field	Setting
Enabled	Select the check box to activate interprocess communication document (ICD) processing.
Interval	Enter the interval at which the gateway should monitor the ICD router database. A setting of 15 seconds is recommended.
Logging	<p>Specify the level of status information that will be written to the ICD router database.</p> <ul style="list-style-type: none"> • None. Records the date and time the fax was submitted. • Terse (recommended). Records the success or failure of the delivery of the ICD. • Normal. Records details that make it useful to the average RightFax user. • Verbose. Records details that make it useful to the RightFax administrator. • Debug. Records all details. This option dramatically increases the size of the EFM Sync database. <p>The ICD status can be monitored in the ICD router database messages view.</p>
Notes Mail Server	Select the Notes mail server where ICD documents are routed.
Router Database	Select the file name where the ICD router database is located (usually in the Notes Mail database.)

5. Under **Receive Inbound Faxes**, specify the following settings.

Table 2c Settings for Inbound Faxes

Field	Setting
Enabled	Select the check box to receive inbound faxes.
Interval	Enter the interval at which the gateway should check the RightFax server for inbound faxes.
Logging	<p>Specify the level of information that will be written to the Fax Receive Log.</p> <ul style="list-style-type: none"> • None. Records the date and time the fax was received and the result. • Terse. (recommended). Records the success or failure of the received fax. • Normal. Records details that make it useful to the average RightFax user. • Verbose. Records details that make it useful to the RightFax administrator. • Debug. Records all details. This option dramatically increases the size of the EFM Sync database. Select this option if you are initially testing the synchronization, if you are experiencing synchronization failures, or if you require details significant to a RightFax customer support engineer. <p>For a description of the log, see "RightFax Event Logs" on page 45.</p>
Notes Mail Server	Select the Notes mail server where faxes should be sent.
Router Database	The name of Notes mail router database where the gateway sends faxes.
Prescan Agent	The name of any Lotus Notes agent that you would like the gateway to run prior to each cycle of checking for received faxes in the mail router database.

Table 2c Settings for Inbound Faxes (Continued)

Field	Setting
Postscan Agent	The name of any Lotus Notes agent that you would like the gateway to run immediately after each cycle of checking for received faxes in the mail router database.
New Fax Subject Line	When a fax is received, this text can be displayed in the subject field of the Notes message that notifies the recipient. The notification message can contain a combination of text and variables. The default is "A new <FAX_NUMPAGES> page fax has arrived from <FAX_CSID>". FAX_NUMPAGES = The number of pages received. FAX_CSID = The sender's caller subscriber ID (CSID).
New Fax From Line	When a fax is received, this text can be displayed in the sender field of the Notes message that notifies the recipient. The notification message can contain a combination of text and variables. The default is "Fax Server <FAXSERVERNAME>". FAXSERVERNAME = The name of the fax server.
Include Original Subject in Completed Fax Notification	The notification to the sender will include the subject line of the sent fax.

Table 2c Settings for Inbound Faxes (Continued)

Field	Setting
Source for Fax Header Image	The header of the message containing an inbound fax can include data about the receipt, such as the name of gateway and the receipt time. The template for this data can be an .rtf file or a Notes form.
Process Fax Body	By default, received fax images are attached to Notes mail messages. To view the fax, the recipient must select the image and open it. You have the following options: <ul style="list-style-type: none"> • To attach fax images, select Attach Fax Images. • To embed the image in the message so that it can be viewed within the message without opening it, select Embed Fax Images. • To embed and attach fax images, select Embed and Attach Fax Images.
Fax Images to Embed	<ul style="list-style-type: none"> • To embed the first page of the image in the mail message, such as the cover page, select First Page. • To embed all the fax page images in the mail message, select All Pages.
Size of Embedded Fax Images	Select the proportionate size for fax images that will be embedded in Notes mail messages rather than attached.
Attach History	To attach a text file that contains the transmission history to each received fax, select Yes .

6. Under **Send Outbound Faxes**, specify settings that affect outbound faxes. You can establish separate settings for:
- Faxes created in Notes that captured only the contents of the Notes form body field and ignored all other elements of the Notes form (such as headers, graphics, and tables).
 - Faxes created with the Notes form elements intact, capturing the *entire* underlying Notes form (instead of the body only).

Table 2d Settings for Outbound Faxes

Field	Setting
Enabled	Select the check box to send outbound faxes.
Interval	Enter the frequency you want the gateway to check the Notes mail server for outbound faxes. The recommended setting is 60 seconds.
Logging	<p>Specify the level of information that will be written to the Fax Send Log.</p> <ul style="list-style-type: none"> • None. Records the date and time the fax was sent and the result. • Terse. (recommended). Records the success or failure of the sent fax. • Normal. Records details that make it useful to the average RightFax user. • Verbose. Records details that make it useful to the RightFax administrator. • Debug. Records all details. This option dramatically increases the size of the EFM Sync database. Select this option if you are initially testing the synchronization, if you are experiencing synchronization failures, or if you require details significant to a RightFax customer support engineer. <p>For a description of the log, see “RightFax Event Logs” on page 45.</p>

Table 2d Settings for Outbound Faxes (Continued)

Field	Setting
Notes Mail Server	Select the Notes mail server where the gateway mail router database resides.
Router Database	The name of the Lotus Notes mail router database where the named gateway sends faxes.
Prescan Agent	The name of any Lotus Notes agent that you would like the gateway to run prior to each cycle of delivering faxes out of the mail router database.
Postscan Agent	The name of any Lotus Notes agent that you would like the gateway to run immediately after each cycle of delivering faxes out of the mail router database.
Export Method	<p>If faxes will consist of the contents of the Notes body field only, select Microsoft Word RTF as the method of export.</p> <p>If faxes will include the Notes form elements, select one of the following options:</p> <ul style="list-style-type: none"> • Notes Native Export. RightFax converts the message to fax format using the native Notes export process. The process runs in the background and does not use the Notes client. This option cannot be used with Notes 5.03 and 5.04. • Notes Client Print Processing. On the RightFax server, the Notes client print process is used to convert a message to fax format. This process is slower than the native Notes export process.
Export Page Size	Determines the page size for the fax. This option is not available for Notes Client Print Processing.

Table 2d Settings for Outbound Faxes (Continued)

Field	Setting
Notes Client Print Timeout	If using Notes Client Print Processing, this setting establishes a time limit for the Notes client on the RightFax server to convert the Notes message to fax format. After this time limit, RightFax will close the Notes client. It assumes that Notes is not working or is waiting for user interaction that has not been received.
Notes Client Print Throttle	Select the interval to run the Notes Client Print Process.
Notes Client Print Cleanup	<p>If using Notes Client Print Processing, this setting determines when the Notes client will be closed and opened to clean up Notes processes on the RightFax server.</p> <p>Important</p> <p><i>Notes will stop processing printed fax forms when it is closed. Thus, in almost all circumstances, especially with high volume, set this option to Never.</i></p> <p><i>For the same reason, do not manually close the Notes client on the RightFax server. If the Notes client is closed, you will see the error, "Unable to open Desktop File..."</i></p>

Table 2d Settings for Outbound Faxes (Continued)

Field	Setting
Unknown Originator	<p>Determines how to handle an outbound fax when the sender has no User Options document in the EFM Sync database:</p> <ul style="list-style-type: none"> • Do not send. Abandons the fax and sends a failure message to the sender. • Send using default user. Retrieves settings and data from the default user document in the EFM Sync database. • Create user record. Retrieves settings and data from the default user document in the EFM Sync database, and creates a new fax user record based on the defaults.
Delete Sent Faxes from Router	Select the check box to have the gateway delete the fax document from the mail router database after the fax is successfully sent.
Force Notification to Always	Select the check box to override the sender's notification setting in the User Options document, thus always sending a notification for faxes sent through this gateway.

7. Under **Real-Time Fax Status**, you can activate real-time fax status reporting. You can establish separate settings for:
- Faxes created in Notes that captured only the contents of the Notes form body field and ignored all other elements of the Notes form (such as headers, graphics, and tables).
 - Faxes created with the Notes form elements intact, capturing the *entire* underlying Notes form (instead of the body only).

Table 2e Settings for Real-Time Fax Status

Field	Setting
Real-Time Fax Status	Select the check box to activate real-time fax status reporting.
Append Cover Page to Log	Select Yes to include cover pages in the real-time fax status report. This will increase the size of the report and the EFM Sync database. Select If Needed to append cover pages for: <ul style="list-style-type: none"> • Faxes held for preview. • Faxes that require approval.
Append Body Images to Log	Select Yes to include body pages of sent faxes in the real-time fax status report. This will increase the size of the report and the EFM Sync database. Select If Needed to append cover pages for: <ul style="list-style-type: none"> • Faxes held for preview. • Faxes that require approval.

Table 2e Settings for Real-Time Fax Status (Continued)

Field	Setting
Append History to Log	Select Yes to include the history of each sent fax in the real-time fax status report. This will increase the size of the report and the EFM Sync database.
Delete Completed Faxes	You can specify whether or not to delete completed faxes from the real-time fax status report after the faxes are successfully sent. <ul style="list-style-type: none"> • Select None to never delete faxes from the report. • Select Successful Only to delete only faxes that are successfully sent. • Select All to delete all faxes from the report.

8. Under **Outbound Conversion Defaults**, specify document conversion defaults for Microsoft Excel, Microsoft PowerPoint, and Visio documents. The password you enter in the **Password** box will be used when RightFax attempts to open a password-protected file for server-side application conversion.

Configuring RightFax Objects in Notes

EFM Sync is a mirror of the RightFax database. If you are synchronizing RightFax to Notes, you should configure the RightFax objects in the RightFax administration utility, Enterprise Fax Manager.

To configure the objects in Notes, double-click the **EFM Sync** icon to open the **EFM Sync** database. Double-click each of these documents to view, add, and edit the RightFax objects in the following sequence:

1. Cover sheets
2. Fax overlay forms
3. Fax printers
4. Billing codes
5. Library documents
6. Fax user groups

Because EFM Sync is a mirror of the RightFax database, each of these documents includes the same settings that appear in Enterprise Fax Manager. For a description of the settings for these objects, please refer to the appropriate chapter of the *RightFax Administrator's Guide*.

Adding and Configuring Users

During the initial installation of RightFax with your Notes system, you must add users to the EFM Sync database. Complete the following steps:

1. Configure the connections document (described on [page 37](#))
2. Configure default user settings (described on [page 38](#))
3. Create routing codes (described on [page 40](#))
4. Set up fax administrators (described on [page 40](#))

5. If installing RightFax for full Notes Mail integration, run the Load Design task (described on [page 40](#))

To begin in Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view. Open the **Fax Users** view.

Configuring the connections document

1. In the **Fax Users** view, click the **Connections** action button.
2. Under **Automated Options**, choose one or both of the following options:
 - **Hide Connections from Users.** Select this option to hide the information in the connections document from users.
 - **Update Fax Factory DB.**
3. Under **Database Connections**, you can review and verify the paths to data folders, databases, and templates.
4. Under **Available Fax Domains**, select the foreign domains that will be used for sending faxes.
5. Click **Save and Close** to save the connections document.

During initial installation, when users are imported from the Notes address book (in a later step), the connections document will be automatically mailed.

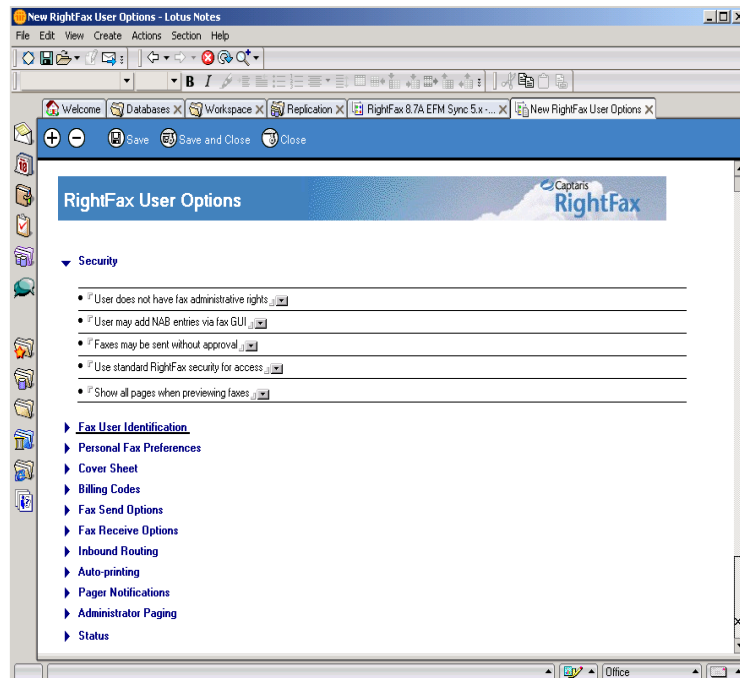
The **Mail Connections Document** button is for later use in the following circumstances:

- If a user deletes the Connections document by mistake.
- If changes are made to the Connections document by the RightFax administrator (for example, if a new server is added and databases are moved.)

Configuring default user settings

1. In the **Fax Users** view, click the **Default User** action button.
2. Because EFM Sync is a mirror of the RightFax database, each of these documents includes the same settings that appear in Enterprise Fax Manager. For a description of the settings for these objects, please refer to the appropriate chapter of the *RightFax Administrator's Guide*.

Figure 2.4 RightFax Default User Settings



Important To globally set the iNotes permission you must open the User Options document and select the security setting relevant to your environment. Click the 'Save and close' button to implement this setting.

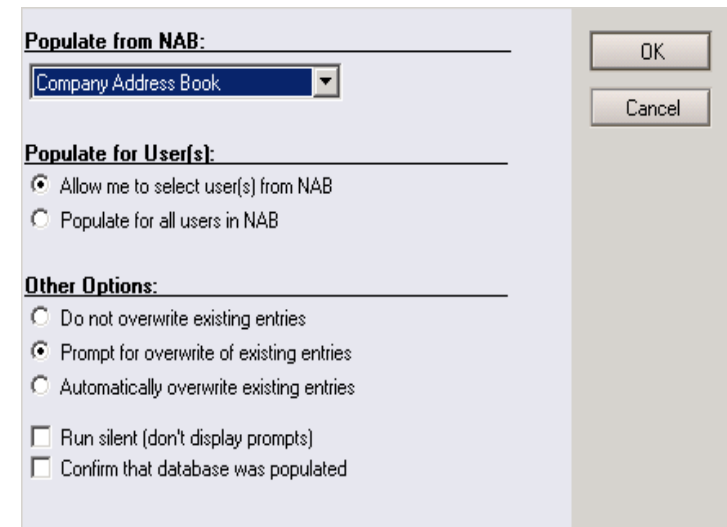
During the initial installation, you should import users to the EFM Sync database from the Notes Address Book, and then you should synchronize the users to the RightFax server. Thereafter, you must do one of the following:

- Maintain users in RightFax and synchronize from RightFax to EFM Sync.
- Maintain users in the EFM Sync database and synchronize from EFM Sync to RightFax.

When users are imported from the Notes Address Book, RightFax mails the Connections document to those users.

1. In the **Fax Users** view, click the **Import Users from NAB** action button.
2. The **Select Population Options** dialog box opens.

Figure 2.5 Import Users from the Notes Address Book



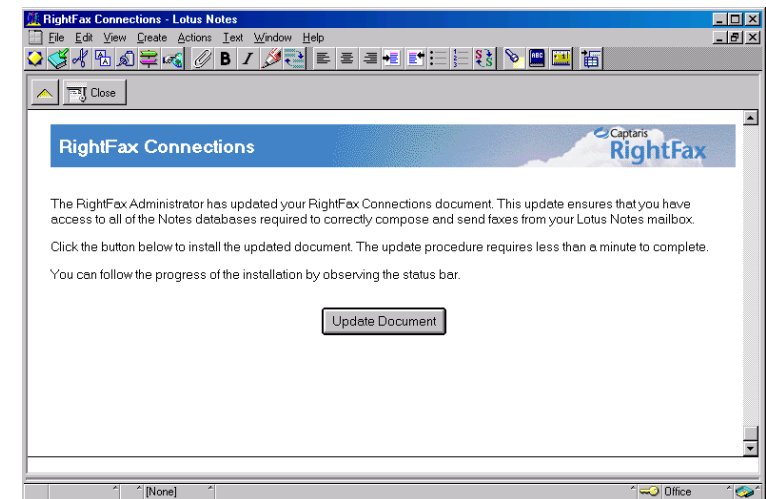
3. Select the address book to import from. From the selected address book, you have the option to select all users or pick the users you want to import.

To create RightFax user IDs that are 21 characters or fewer, in the **Shorten long IDs box** enter a value between 5 and 21.

4. Under **Other Options**, select **Run silent** if you want to import users without prompts. This option is helpful for importing a large number of users, because you can leave the system unattended during the import process.
5. Select one of the following options:
 - **Prompt for overwrite of existing entries.** If a duplicate entry is found, you will have the option to delete or retain the original entry.
 - **Automatically overwrite existing entries.** If a duplicate entry is found, the original entry will be deleted.
 - **Do not overwrite existing entries.** If a duplicate entry is found, the original entry will be retained.

6. Click **OK** to import the users. When users are imported from the Notes Address Book, RightFax mails the Connections document to those users. Users receive the Connections document in their Inboxes. Depending on the settings in the Connections document (described on [page 37](#)), users must open the document, and click **Update Document**. This installs the fax factory database in their mail databases.

Figure 2.6 RightFax Connections Document

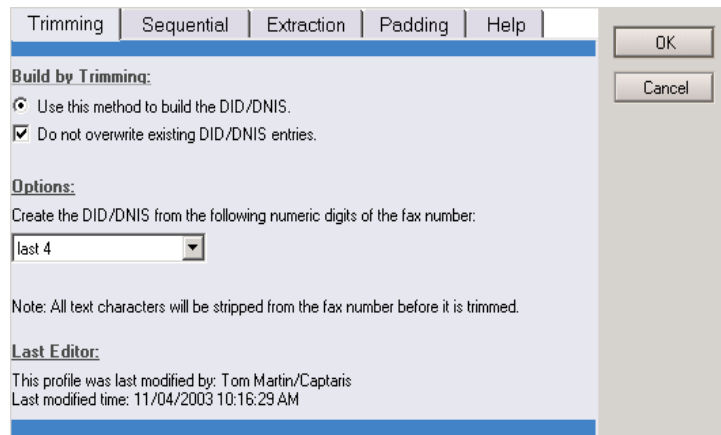


Creating routing codes

When you create new fax user documents in the EFM Sync database by importing from the Notes address book, the DID or DNIS routing code for each user is not copied. The codes must be created for the users.

1. In the **Fax Users** view, click the **Create DID/DNIS for Selected Fax Users** action button. The **Build DID/DNIS** dialog box opens.

Figure 2.7 Build DID/DNIS Dialog Box



2. To choose a method for building routing codes, refer to the *admin help* database.

Creating RightFax administrators

Changes to the EFM Sync database can be made only by RightFax administrators.

During the gateway installation (described in [Chapter 1, “Installing the Lotus Notes Module”](#)), you are prompted for the user or group to have administrative rights. Any Notes users in the RightFax administrative group can grant or deny access to other users. Add

or remove Notes users to this group to grant or deny access to EFM Sync. Members of this group must have Notes Manager access rights to EFM Sync.

To make changes to the EFM Sync database, members of this group must also be assigned administrative rights in RightFax. You can assign these rights in the RightFax administration utility, Enterprise Fax Manager, or in EFM Sync. If you are synchronizing RightFax to Notes, you should create administrators in Enterprise Fax Manager.

To create RightFax administrators in Notes

1. In Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view. Open the **Fax Users** view. A list of your RightFax users appears in the view.
2. Open the user who should be a RightFax administrator. Under **Security**, select **User has fax administrative rights**.

Refreshing users' Notes mail template

If you are installing the *full* Notes Mail integration with RightFax, you must distribute the RightFax mail template design to all Notes mail users. Users' mail databases will be refreshed with the RightFax mail template design.

To update the design

At the command prompt in the Domino server console window, type “Load Design” and press ENTER. Depending on the number of Notes mail users, the process may take several minutes. The process is complete when the prompt **Database Designer Shutdown** appears.

Configuring Users for E-mail Notification of Received Faxes

The gateway for Lotus Notes can be used for notification of received faxes whether or not the gateway is configured to actually send and receive faxes.

To configure a user to receive fax notifications in Notes

1. In RightFax Enterprise Fax Manager, double-click the user to open the **User Edit** dialog box, and then click the **Notification** tab.

Figure 2.8 The User Edit Notification Tab in RightFax

The screenshot shows the 'User Edit' dialog box with the 'Notification' tab selected. The 'Method' dropdown is set to 'Lotus Notes'. The 'Notification Address/Info' field contains 'JANE DOE'. The 'Notification about outbound faxes' section has several checkboxes: 'Beginning of Transmission' (unchecked), 'During Transmission' (unchecked), 'Error encountered, fax will be retried' (unchecked), 'Error encountered, fax will be abandoned' (checked), 'Fax is successfully sent' (checked), 'Fax is incomplete' (checked), 'Fax remains incomplete' (unchecked), 'Fax is held/ready for preview' (checked), and 'Fax is held/ready for approval' (unchecked). The 'Notification about received faxes' section has 'When initially received' (checked), 'While fax has not been viewed or printed' (unchecked), and 'Reroute received fax notification?' (unchecked). The 'Reroute to user:' dropdown is empty. The 'OK' and 'Cancel' buttons are at the bottom.

2. In the **Method** list, select **Lotus Notes**.

3. In the **Notification Address/Info** box, type the common name format of the first entry in the User Name list of the intended recipient.
4. In the lists of notifications for outbound and inbound faxes, select the notifications that users should receive.

Group notification

The notification method can be configured for a group of RightFax users by editing the group properties in Enterprise Fax Manager and setting the group **Notification Type** to **Lotus Notes**.

■ ■ ■

Chapter 3

Using the RightFax Lotus Notes Module

The RightFax Lotus Notes Module lets user send and receive faxes and documents that are converted to fax format and attached to email messages, and send SMS messages. Users have many options for configuring the behavior and format of their messages, cover sheets, and library documents—all from the RightFax Lotus Notes Module interface.



Caution *The priority setting on faxes sent from the Notes client uses the Domino prioritization settings. If a fax is sent with low priority, and the Domino server is configured to send low priority messages at midnioght (the dafault Domino setting), then the fax will not be delivered to the RightFax server until midnight.*

Users can also use iNotes to gain RightFax functionality through an Internet browser, and RightFax embedded codes provide flexibility when sending mail messages as faxes.

Sending a Notes mail message to a fax number, email address, or mobile device as an SMS message is similar to sending mail, except that the message is specially addressed.



Note *Sending RightFax messages of type “Document” (for Certified Delivery) requires that the recipient have an SMTP e-mail address, and sending RightFax messages of type “SMS” requires that the recipient have a cell phone number. Either of these may be picked from the Domino Directory or from the Personal Address Book. If the required information is not present, the user will not appear in the address of the memo once the Addressing dialog box has been closed.*

Users can also compose faxes while disconnected from the Domino server (for example, using a laptop).

Users have many other options as well, including previewing a fax before sending it and forwarding a fax that was sent to them.



Important *To use forms print processing on a Windows 2000 system, the Lotus Notes client on the RightFax server must be open and logged on to the network at all times.*

For detailed information on how to use RightFax to send and receive faxes, documents, and SMS messages, see the *user help* that accompanies the RightFax Lotus Notes Module.

■ ■ ■

Chapter 4

RightFax Logs and Reports in Lotus Notes

Lotus Notes generates RightFax event logs and RightFax status reports and stores them in the EFM Sync database.

RightFax Event Logs

To open RightFax event logs in Notes, open the EFM Sync database, and then open the **Logs** view. Click each log document to view the log entries.

DID/DNIS Build Log

The DID/DNIS Build Log displays the results of the process used to assign DID or DNIS numbers to users. It records the build number, build starting time, build ending time, the method used to create the DID/DNIS entries, and the range of numbers that were created (for the sequential numbering method).

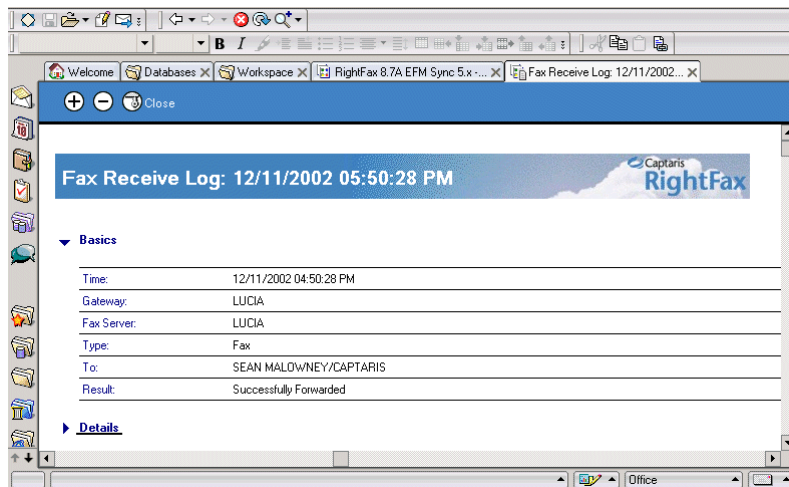
Figure 4.1 The DID/DNIS Build Log

DID/DNIS Build Log			
Domino Server:	Local		
NAB Title:	N/A		
NAB Filepath:	N/A		
Build Method:	Trimming the last 4 digits from the user's fax number.		
Pad Format:	Padding not used.		
DID/DNIS Range:	N/A		
Begin Build:	07/10/2001 12:08:56 AM		
End Build:	07/10/2001 12:08:58 AM		
Unsuccessful Builds:			
Notes User		Error Message	
Successful Builds:			
Notes User	Notes Office Fax	RightFAX Fax Number	DID/DNIS
Sue Drummond/RightFAX	N/A	555-7821	7821
Kelso Gaylord/RightFAX	N/A	555-5496	5496
Constance Morrow/RightFAX	N/A	555-0968	0968
Jon Pearlman/RightFAX	N/A	555-1337	1337
Jenna Tremelman/RightFAX	N/A	555-7400	7400
Danny Trent/RightFAX	N/A	555-4481	4481

Fax Receive Log

The Fax Receive Log displays a list of all faxes routed via the RightFax gateway to Notes. It records the time each fax was received, the name and description of the gateway that delivered the fax, and the transmission result.

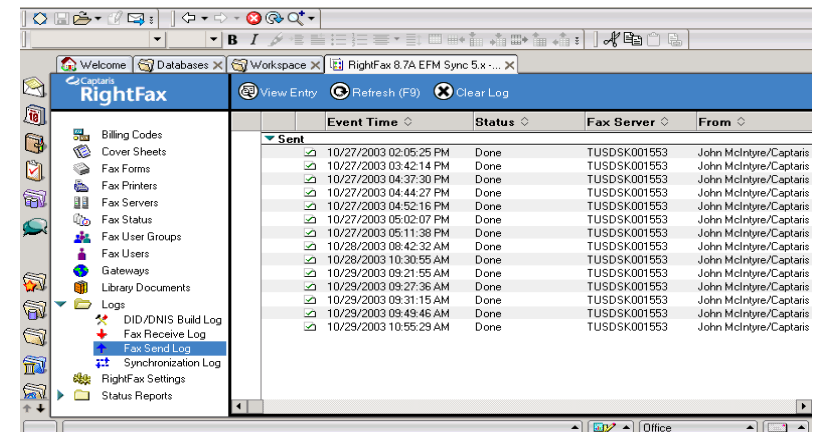
Figure 4.2 The Fax Receive Log



Fax Send Log

The Fax Send Log displays a list of all faxes sent to the RightFax server via the gateway. It records the time each fax was sent, the name and description of the gateway that sent the fax, and the transmission result.

Figure 4.3 The Fax Send Log

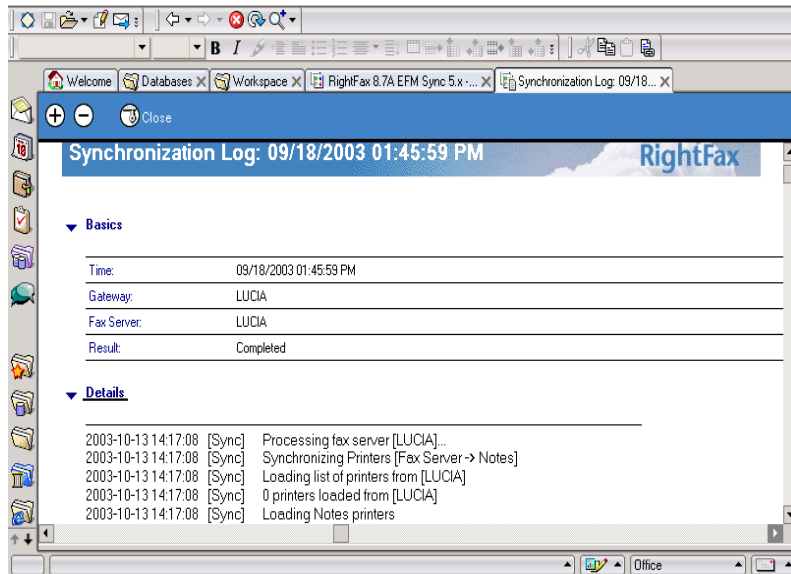


Synchronization Log

The Synchronization Log displays the synchronization events between the RightFax and Domino servers. It displays the time each synchronization event was recorded and the names of the gateway and RightFax server that were synchronized.

Double-click each synchronization log document to display details about the synchronization event. The level of detail in this log depends on the value you specify in the **Synchronization Logging** field in the Fax Server document in the EFM Sync database (see [“Enabling database synchronization”](#) on page 27).

Figure 4.4 The RightFax Synchronization Log



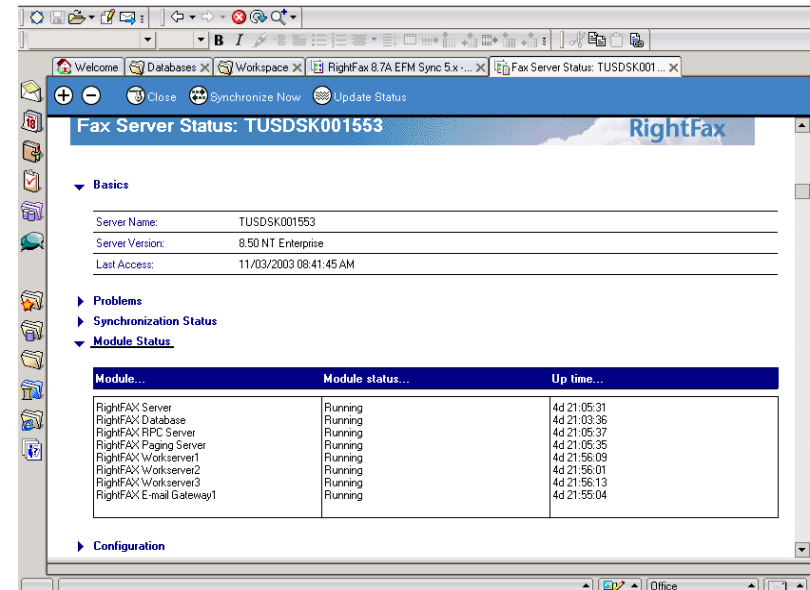
RightFax Status Reports

To open RightFax status reports in Notes, open the EFM Sync database and open the **Status Reports** view. The list of RightFax status reports appears.

Fax Server Status Report

When you select the Fax Server Status Report, a list of your RightFax servers appears. Double-click a server to open the Fax Server Status Report for that server. The status settings on the report cannot be edited. To change the status of synchronization events, edit the Fax Server document in the EFM Sync database [“Enabling database synchronization”](#).

Figure 4.5 The Fax Server Status Report



Gateway Status Report

When you select the Gateway Status Report, a list of your RightFax e-mail gateways appears. Double-click an e-mail gateway to open the Gateway Status Report for that server. The status settings on this report cannot be edited. To change the status of any listed event, edit the Gateway document in the EFM Sync database.

Figure 4.6 The Fax Gateway Status Report

The screenshot displays the 'Gateway Status (Gateway: TUSDSK001553 ... Fax Server: TUSDSK001553)' report. The report is organized into sections: Basics, Problems, and Gateway Event Status.

Basics

Gateway Name:	TUSDSK001553
Connected Fax Server:	TUSDSK001553
Current Status:	
Last Access:	11/03/2003 08:41:45 AM

Gateway Event Status

Gateway event...	Event status...	Time last processed...
Synchronization:	Enabled	11/03/2003 08:40:19 AM
ICD Status:	Enabled	11/03/2003 08:41:35 AM
Fax Server Status:	Enabled	11/03/2003 08:41:37 AM
Inbound Faxing:	Enabled	11/03/2003 08:41:35 AM
Outbound Faxing - Body Contents Only:	Enabled	11/03/2003 08:41:32 AM
Outbound Faxing - Include Notes Form:	Enabled	11/03/2003 08:41:36 AM

* Edit the gateway document to change the status of a gateway event.

■ ■ ■

Appendix A

E-mail Compatible Embedded Codes

Embedded codes are special faxing instructions that you insert directly into fax-bound e-mail messages. You can use embedded codes to include fax cover sheet information, attach library documents, specify a time to send the fax, and more.

To add an embedded code to an e-mail message, type the code you want, along with any required parameters, between angle brackets. For example, an embedded code that tells RightFax to include the library document "Priceguide" along with the text of the e-mail is written as:

```
<LIBDOC2:PRICEGUIDE>
```

RightFax removes all embedded codes from the e-mail message when it converts it to fax form, so they don't appear in your final fax. If you type an embedded code incorrectly, it will be ignored by RightFax and will be included in your fax. Embedded codes may be written in either upper or lower case and embedded codes always work the same way regardless of the e-mail application used to create the document.

Although you can use any fonts you want in the text of your e-mail messages, embedded codes *must always* use a native printer font. This is because when the file is converted to PCL5 format, all other font types are encoded as graphic images. Only native printer fonts are stored in the PCL file in their original text format. It is this text in the PCL file that is replaced. If you do not use native printer fonts for your embedded codes, the codes themselves will appear in the

instead of being replaced by the information or instruction they represent. All embedded codes are surrounded by angle brackets (<>) which must also use the same native printer font.



Note *Windows 2000 may add unexpected spacing or other characters to embedded code strings even when using a native printer font. For embedded codes in documents on Windows 2000 machines, RightFax recommends using the "Courier" native printer font only.*

Embedded codes can be placed anywhere in the e-mail message that you will be faxing. They cannot line wrap and any embedded code statement that is so long that it wraps to a second line will be ignored.

This appendix lists only embedded codes that are recognized by the e-mail gateways. RightFax supports several additional embedded codes when faxes are generated from native applications. For a complete list of embedded codes supported by RightFax, refer to the *RightFax Administrator's Guide*.

ATDATE**Format** <ATDATE:date>

Schedules the fax to send on a specific date. Dates can be expressed as relative or absolute. Relative dates give the number of days from today's date. For example, "+7" represents one week from today. Absolute dates specify the exact date to send the fax. Absolute dates must be written in one of these formats: MM/DD/YY, MM-DD-YY, or MM-DD-YYYY.

If no send time is specified with the ATTIME code (described later), the send time defaults to "now" (the current time of processing). For example, if a fax is sent to the queue at 3:30 p.m. and it contains only an <ATDATE:+1> code, it will automatically be scheduled to send at 3:30 p.m. tomorrow.

Maximum field length: 10 characters

Example <ATDATE:9-15-99>
<ATDATE:+2>

ATTIME**Format** <ATTIME:time>

Schedules the fax to send at a specific time. The time can be relative or absolute.

Relative time is the number of hours or minutes from the current time. For example, "+2" is two hours from now. You can enter fractions of an hour in six-minute increments. Valid fractions of an hour are 0.1 through 0.9. You must enter at least one digit before and after the decimal point. For example, 1.5 and 0.3 are valid, and 1.50 and .3 are not valid.

Absolute times are entered in either 12-hour or 24-hour format. A colon separating hours and minutes is optional, and an "a" or "p" can be used to indicate A.M. or P.M. The fax server does not send the fax at exactly the minute specified. Rather, the fax becomes eligible for scheduling within 15 minutes of the specified time.

Specifying a time between the current time and midnight will schedule the fax to send today. Specifying a time earlier than the current time will schedule the fax tomorrow.

Maximum field length: 9 characters

Example <ATTIME:10:00p>
<ATTIME:+2>

BILLINFO1 (BI1)**Format** <BILLINFO1:code>

Assigns a billing code to the fax. The billing code will be sent but it will not be validated by RightFax.

Maximum field length: 15 characters

Example <BILLINFO1:4444>

BILLINFO2 (BI2)**Format** <BILLINFO2:code>

Assigns a second billing code to the fax. The billing code will be sent but it will not be validated by RightFax.

Maximum field length: 15 characters

Example <BILLINFO2:5555>

CHANNEL

Format <CHANNEL:channel#>

Sends the fax only on the specified channel of the fax board. Specify a number corresponding to the channel to use. Set the channel number to 0 (zero) to use any available channel.

This code is useful if your organization uses one channel for priority faxing, and you want the fax to go out right away. You can also use this code to limit fax broadcasts to one channel only, leaving the other channels free for priority faxing.

Maximum field length: N/A

Example <CHANNEL:3>

COVER

Format <COVER>

Automatically generates a RightFax cover sheet for the fax containing the code. If the user sending the fax containing this code is configured to automatically generate a cover sheet, only one cover sheet will be generated.

Unless a cover sheet file name is specified using the <FCSFILE> embedded code (see “[FCSFILE](#)” on [page 51](#)), this code will automatically use the default cover sheet file.

Maximum field length: N/A

DELETE

Format <DELETE>

Deletes the fax from the user’s FaxUtil mailbox after it has been successfully sent. This code overrides the default RightFax auto-delete setting.

Maximum field length: N/A

DELETEALL

Format <DELETEALL>

Deletes all faxes from the user’s FaxUtil mailbox after the fax has been sent, whether or not the send was successful. This code overrides the default RightFax auto-delete setting.

Maximum field length: N/A

FCSFILE

Format <FCSFILE:file name>

Uses the specified file as the RightFax-generated cover sheet. The cover sheet file must exist in the RightFax\FCS folder on the RightFax server and must end with the extension .pcl. Do not specify a directory path.

Maximum field length: 12 characters

Example <FCSFILE:MYCOVER1.PCL>

FINE

Format <FINE>

Converts the body of the fax using “fine” resolution (200 × 200 DPI). Fine resolution is recommended for faxes with detailed graphics and faxes that will be OCRed. This code overrides the default fax resolution set in the user’s FaxUtil mailbox.

Maximum field length: N/A

FROMFAXNUM

Format <FROMFAXNUM:faxnumber>

Specifies the sender’s fax number on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code will be ignored.

Maximum field length: 31 characters

Example <FROMFAXNUM:(520)555-1234>

FROMGENFAXNUM**Format** <FROMGENFAXNUM:faxnumber>

Specifies the company's general fax number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code will be ignored.

Maximum field length: 31 characters

Example <FROMGENFAXNUM:(520)555-2345>**FROMGENPHONE****Format** <FROMGENPHONE:phonenumber>

Specifies the company's general phone number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code will be ignored.

Maximum field length: 31 characters

Example <FROMGENPHONE:(520)555-3456>**FROMPHONE****Format** <FROMPHONE:phonenumber>

Specifies the sender's phone number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code will be ignored.

Maximum field length: 31 characters

Example <FROMPHONE:(520)555-4567>**IGNORE****Format** <IGNORE>

Causes all subsequent embedded codes to be ignored.

Maximum field length: N/A

LIBDOC**Format** <LIBDOC:documentID>

Sends the specified RightFax library document *in addition* to sending the document containing the code. Multiple library documents may be specified, each as a separate LIBDOC code. When used with e-mail gateways, this embedded code functions exactly the same as LIBDOC2.

Maximum field length: 21 characters

Example <LIBDOC:INFOPACK1>**LIBDOC2****Format** <LIBDOC2:documentID>

Sends the specified RightFax library document *in addition* to sending the document containing the code. Multiple library documents may be specified, each as a separate LIBDOC2 code. When used with e-mail gateways, this embedded code functions exactly the same as LIBDOC.

Maximum field length: 21 characters

Example <LIBDOC2:INFOPACK1>**NOCOVER****Format** <NOCOVER>

Turns off automatic RightFax cover sheet generation for the document containing this code.

Maximum field length: N/A

NORMAL

Format <NORMAL>

Converts the body of the fax using “normal” resolution (100 × 100 DPI). Normal resolution faxes can be transmitted much faster than fine resolution faxes, saving time and phone charges. This code overrides the default fax resolution set in the user’s FaxUtil mailbox.

Maximum field length: N/A

PREVIEW

Format <PREVIEW>

Holds the fax for preview in your FaxUtil mailbox. You must view the fax in FaxUtil and select **Release** from the **File** menu before it will send.

Maximum field length: N/A

PRIORITY

Format <PRIORITY:priority>

Sets the priority of the outgoing fax. Allowed settings are: Low (L), Normal (N), and High (H). If a user specifies high priority and does not have the “Can use high priority” permission, the fax will automatically be sent with “normal” priority.

Maximum field length: N/A

Examples<PRIORITY:H>
<PRIORITY:N>

RETRYCOUNT

Format <RETRYCOUNT:#>

Specifies the number of times the fax will be retried after encountering transmission errors (such as a busy signal or human answered line). A value of 0 (zero) tells the fax server to use the system defaults.

Maximum field length: 2 numeric digits

Example <RETRYCOUNT:3>

RETRYINTERVAL

Format <RETRYINTERVAL:#>

Specifies the length of time in minutes between retry attempts when transmission errors (such as a busy signal or human answered line) are encountered.

Maximum field length: 2 numeric digits

Example <RETRYINTERVAL:2>

SAVE

Format <SAVE>

Instructs RightFax to *not* delete the fax image from the user’s FaxUtil mailbox after being sent. This overrides any default auto-delete setting.

Maximum field length: N/A

SMARTRESUME

Format <SMARTRESUME>

Enables the Smart-resume feature.

Maximum field length: N/A

■ ■ ■

Appendix B

File Formats that Convert to Fax Format

The following table lists the software applications and document file formats that can be converted to faxes by the built-in conversion engine on the RightFax server. Only these file types can be converted from their native format by sending as file attachments to a fax message or by using the Send To function in Windows.

Table B1 Supported Document File Formats

Application or file format	Supported versions
ANSI text (7 & 8 bit)	All versions
ASCII text (7 & 8 bit)	All versions
Binary group 3 fax	All versions
BMP (including RLE, ICO, CUR, and OS/2 DIB & OS/2 Warp)	Windows versions
CDR (if TIFF image is embedded in it)	Corel Draw versions 2.0 through 9.0
DCX (multi-page PCX)	Microsoft Fax
DRW (Micrografx Designer)	Version 3.1
DRW (Micrografx Draw)	Versions through 4.0
EPS	If TIFF image is embedded
Freelance for Windows	Version 1.0, 2.0, 96, 97, and Millennium

Table B1 Supported Document File Formats (Continued)

Application or file format	Supported versions
GIF	Compuserve
HTML	Versions through 3.0
JPEG (includes EXIF)	All versions
Lotus 1-2-3 (DOS & Windows)	Versions through 5.0
Lotus 1-2-3 (OS/2)	Versions through 2.0
Lotus 1-2-3 Charts (DOS & Windows)	Versions through 5.0
Lotus 1-2-3 Charts (OS/2)	Versions through 2.0
Lotus 1-2-3 for SmartSuite	SmartSuite 97, Millennium, and Millennium 9.6
Lotus AMI/AMI Professional	Versions through 3.1
Lotus Symphony	Versions 1.0, 1.1, and 2.0
Microsoft Binder	Version 7.0, Binder 97
Microsoft Excel Charts	Versions 2.x through 7.0
Microsoft Excel for Macintosh	Versions 3.0 through 4.0, 98, and 2001
Microsoft Excel for Windows	Versions 2.2 through 2002

Table B1 Supported Document File Formats (Continued)

Application or file format	Supported versions
Microsoft Multiplan	Version 4.0
Microsoft PowerPoint for Macintosh	Version 4.0, 98, and 2001
Microsoft PowerPoint for Windows	Versions through 2002
Microsoft Rich Text Format (RTF)	All versions
Microsoft Windows Works	Versions through 4.0
Microsoft Word for DOS	Versions through 6.0
Microsoft Word for Macintosh	Versions 4.0 through 2001
Microsoft Word for Windows	Versions through 2002
Microsoft WordPad	All versions
Microsoft Works for DOS	Versions through 2.0
Microsoft Works for Macintosh	Versions through 2.0
Microsoft Works for Windows	Versions through 4.0
Microsoft Write	Versions through 3.0
Novell WordPerfect for DOS	Versions through 6.1
Novell WordPerfect for Macintosh	Versions 1.02 through 3.0
Novell WordPerfect for Windows	Versions through 7.0
PCX bitmap	PC Paintbrush
PICT1 and PICT2 (Raster)	Macintosh standard
QuattroPro for DOS	Versions through 5.0
QuattroPro for Windows	Versions through 10
TIFF	Versions through 6
TIFF CCITT Group 3 & 4	Fax Systems
Unicode Text	All versions

Table B1 Supported Document File Formats (Continued)

Application or file format	Supported versions
UUEncode	No specific version
WordPerfect Graphics (WPG and WPG2)	Versions through 2.0
ZIP	PKWARE versions through 2.04g

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