



Version 9.4
Lotus Notes Module Guide

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Edition

Information in this document applies to version 9.4 of the RightFax Lotus Notes Module Guide.

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Chapter 1

Understanding the RightFax Lotus Notes Module



Note *The RightFax Lotus Notes Module Guide augments the admin and user help that accompanies the RightFax Lotus Notes Module. For information on topics not found in this guide, see the admin and user help. Shortcuts to admin and user help are created during the Notes install and are located on the Notes workspace.*

The RightFax Lotus Notes Module provides inbound and outbound faxing via RightFax directly from the Notes or iNotes clients. The RightFax Lotus Notes E-mail Gateway and a Notes client are installed on the RightFax server. Using the Notes client, the gateway 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.

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.

The RightFax Lotus Notes Module installs several RightFax-specific database files on the Domino server. One of these files (RFAXSYNC.NSF or “EFM Sync”) can be synchronized with the RightFax, thus allowing for configuration and administration of RightFax from your Notes server or your RightFax server.

Users can compose faxes while disconnected from the Domino server (for example, using a laptop) and also have many other options, including previewing a fax before sending and forwarding a fax that was sent to them.

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.



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.*

Notes Integration Options

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.

- **Full Mail Integration** With a full integration, the RightFax setup adds RightFax forms, subforms, and agents to the Notes mail template to create a RightFax template. Notes users can then use this template, which is known as the RightFax advanced form, to send a fax from Notes. The Domino server composes outgoing faxes and stores outgoing and incoming faxes in each user's Notes mail database. RightFax also stores outgoing and incoming faxes in its own database. A full integration also adds a special document named User Options to each user's mail

database. Users can edit their copies of this document to configure their personal fax settings.

- **Minimal Mail Integration** With a minimal integration, fax composition occurs in a fax factory database that is installed locally on the user's computer. To send a fax, users use a basic RightFax form. The fax factory then composes the fax. As in the full integration, outgoing and incoming faxes are stored in the user's mail database and the RightFax database. The minimal integration setup adds the following new components to the user's mail database: An agent (Actions>Fax Tools>New RightFax Document, Fax, and SMS), an agent (Actions>Fax Tools> Real-time Fax Status), one shared folder (RightFax Settings), and RightFax User Options document (located in the RightFax settings folder). For more information about a minimal mail integration, see [“Understanding the fax factory”](#).
- **No Mail Integration** No mail integration allows users to send memos as faxes with the standard Notes Memo form and RightFax embedded codes (which users type into the body of the memo). The no-mail integration locally stores the Notes databases required by the RightFax module. Faxes are moved to the Domino server by means of foreign domains referenced in the manual addressing of the faxes. The RightFax databases are on the Domino server and handle the routing of the faxes sent to them by means of the foreign domain routing. It makes no modifications to any Notes mail template or any users' mail databases. Fax documents are stored both in the RightFax database and in the user's Notes mail database.
- **iNotes Integration** The RightFax Lotus Notes Module supports Lotus iNotes (also called Domino Web Access) in a minimal-mail integration. This allows for fax usage via a web browser, including the ability to send and view faxes, and set advanced fax attributes.

Understanding the fax factory

If you choose minimal Notes Mail integration, RightFax will install the fax factory database to 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.

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Chapter 2

Installing the Lotus Notes Module

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. Activate the RightFax Lotus Notes Module (described on [page 9](#)).
3. Choose the type of integration you want for your RightFax and Notes system (described on [page 5](#)).
4. Configure the Notes E-mail Gateway and RightFax Server (described on [page 11](#)).
5. Use the installer database to install the database files for your RightFax integration (described on [page 11](#)). A manual installation, if required is documented ([page 13](#)).
6. Configure the EFM Sync Database (described in [Chapter 3](#), “[Configuring the EFM Sync Database](#)”).

Activating the Lotus Notes Module

The files required by the RightFax Lotus Notes Module are installed on all RightFax servers during the server installation, however, to establish functionality, the Lotus Notes Module must first be licensed and activated.

To activate the Lotus Notes Module, you must have licensed a RightFax server 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*.

New Install Requirements

- RightFax 9.4
- Lotus Domino server R6.5, R7, or R8. Captaris recommends that your Domino server and RightFax server be located on separate computers.
- Lotus Notes R6.5, R7, or R8 clients, one of which must be installed on the RightFax or remote e-mail gateway 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 are confined to the MAIL.BOX of the active node (i.e., 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. For instructions on configuring your Connections document, see Domino documentation .

Upgrade Requirements

- RightFax 9.0 or 9.3 with a functional Notes integration
- Lotus Notes R6.5 with any RightFax mail integration
- Lotus Notes R7 with RightFax 'no-mail' integration only

Lotus Requirements

The person performing the install and Notes 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.
- Manager access to all mail database files of all imported iNotes users.

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.
- Manager access in the ACL of their mail database. iNotes users must have a minimum of Editor access and the ability to run unrestricted Lotus Script and Java agents on the host Domino server.

Regional Language Requirements

The Notes content language setting defines a regional dialect e.g., French (Canada) or French (France). Before installing the RightFax database files, you must verify the content language setting of the Notes client you plan to install RightFax with, is configured to use a language supported by RightFax (shown below). For more information about the Notes content language setting, see Lotus Notes help.

Notes content languages supported by RightFax

- Chinese (China)
- English (United States)
- French (Canada)
- French (France)
- German (Germany)
- Italian (Italy)
- Japanese
- Portuguese (Brazil)
- Spanish (Mexico)

Full Mail Integrations and Domino Language Packs

If your organization plans to implement a full mail integration and the Domino server hosting the RightFax database files has 4 or more language packs installed, you cannot build an optional full mail template (step 5 of the RightFax install) and instead must create a new connection using the *Full* integration profile shipped with RightFax. For more information about creating new connections and RightFax integration options, see the RightFax Admin help, available on the Notes workspace.

Additional Requirement

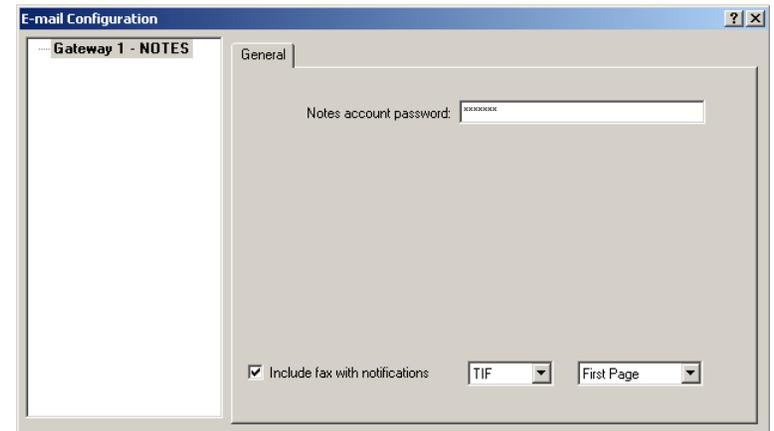
To use the RightFax integration with iNotes, all client workstations must have the Java Virtual Machine available from Sun Microsystems.

Configure the Notes E-mail Gateway and RightFax Server

1. On the RightFax server or remote E-mail Gateway server, open the Windows Control Panel and double-click the **RightFax E-mail Gateway** applet. The E-mail Gateway configuration opens (fig 1.1).
2. If you are upgrading from a previous RightFax integration with Notes, skip this step and continue to step 3. If you are performing a new install, you must first add the Notes E-mail Gateway. To add a new gateway, click **Add Gateway**. Select Lotus Notes from the list of gateway choices and click Select. Click the Notes gateway in the left pane list to view its configuration options. Next, in the **Notes account password** field, enter the password for the User.ID file that will be used by the Lotus Notes client to install the RightFax database files, and subsequently by the gateway to communicate with Domino.
3. If **Include fax with notifications**. If checked, notifications of successfully sent faxes or notifications of faxes that failed to send will include a viewable copy of the fax. Once enabled, select **TIF** or **PDF** format. Choose **First Page** if you want only the first page of the fax to be included with the notification. Choose **All Pages** if you want the full fax to be included. When finished, click **OK**.
4. Open the \RightFax\Gateway folder and copy the RightFax database installer (RFINSTALL.NSF) to the Notes client computer that will be used to install the RightFax database files.
5. Open Enterprise Fax Manager and in the left pane, click your fax server name. RightFax services are now viewable on the lower right side of Enterprise Fax Manager. In the list of running services, right-click the RightFax E-mail Gateway and choose

Stop Service.

Figure 2.1 The E-mail Configuration Dialog Box



Tip 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.

Installing the Notes Database Files

1. If you are upgrading, and have not already done so, back up the folder containing the RightFax database files. The default location is on the Domino server at \Domino\Data\RightFax.
2. Open a Notes client and logon with the Notes ID used to configure the e-mail gateway.
3. From the Notes client, click the **File** menu and choose **Database > Open** (R8 clients use **File > Application > Open**). Click the browse button to locate the \RightFax\Gateway folder. Double-click the file **RFINSTALL.NSF**. The About RightFax 9.3 Installation Database file opens. Click the 'X' to close this window and proceed to the RightFax Installation Database.

4. Review the comments at the Welcome screen. When finished, click **Start**. The first of several Execution Security Alerts you will receive during the installation will appear. Enable the option to **Start trusting the signer to execute this action** and click **OK**. Do this for all remaining Security Alerts you receive during the installation. At the Step 1 window, click **Next**.
5. The installer will detect files from a previous RightFax integration. When RightFax files are found, the installer defines your setup as an Upgrade. If you are upgrading from a previous RightFax integration, verify the upgrade option is chosen, the setup options are correct, and click **Next** to proceed with the upgrade and continue to Step 3.

If you are not upgrading, use the pick-list button to browse to the Domino server to install RightFax components to. You may also enter this information manually. The default location is \Domino\Data\RightFax. If you do not wish to install to \Domino\Data\RightFax, you must add the following entry to the Notes section of the Notes.ini file on the fax server or e-mail gateway server: **RF_Syncdatabase=Fax\RFAXSYNC.nsf**.

For more information about Notes.ini, contact your Lotus administrator. Click **Next** to proceed to Step 3.

6. On the **Configure fax rendering** document, specify one or both of the fax rendering options and associated foreign domain. Click **Next** to proceed to Step 4.
7. Choose **Yes** if you have explicit permission to **Create new databases & templates and Create new replicas**. If you do not have explicit permission, but belong to a group with these permissions, choose **No** and enter the group name or browse to the group using the pick-list. For more information about these permissions, contact your Lotus administrator. Click **Start** to begin copying RightFax database files to your Domino server. When finished, click **Next** to proceed to Step 5.

8. If your organization will use a full mail integration and would like to update your mail template using the Load Convert command on a Domino server, enter the required information and click **Start**. When finished, click **Next** to proceed to Step 6. If your organization will not use a full mail integration, click **Skip** to proceed to Step 6. For more information about Load Convert see ["To Update User Mail Files with Load Convert"](#).
9. Choose **Yes** or **No** to add Workspace shortcuts to the newly installed RightFax database files. Click **Close** to finish the install.
10. Restart the Notes E-mail Gateway. Click **Done**, and then close the dialog box to return to the workspace.

To Update User Mail Files with Load Convert

Follow the steps below to incorporate RightFax design elements into user mail files using Load Convert from a Domino console. For more information about Load Convert, contact your Domino administrator.

1. To update the mail file for all Lotus users, logon to a Domino console, and type:
load convert mail/*.nsf * RightFax/rfaxmail.nsf and press Enter.

or to update individual user mail files, logon to a Domino console, and type:
load convert mail/<user ID>.nsf * RightFax/rfaxmail.nsf and press Enter.
2. The process is complete when the Load Convert Utility Shutdown appears.
3. Minimize the Domino console and return to the Notes client workspace.

Extracting the RightFax Database Files to Prepare for Manual Installation

Complete the following steps if you prefer or are required to install the RightFax database files manually.



Note *Upgrades and creation of full-mail integration templates are not possible using a manual installation.*

1. Configure the Notes Gateway and RightFax server using the instructions on [page 11](#).
2. Open a Notes client and logon with the Notes ID used to configure the e-mail gateway.
3. From the Notes client, click the **File** menu and choose **Database > Open** (R8 clients use **File > Application > Open**). Click the browse button to locate the \RightFax\Gateway folder. Double-click the file **RFINSTAL.NSF**. The About RightFax 9.3 Installation Database file opens. Click the 'X' to close this window and proceed to the RightFax Installation Database.
4. Review the comments at the Welcome screen. When finished, click **Start**. The first of several Execution Security Alerts you will receive during the installation will appear. Enable the option to **Start trusting the signer to execute this action** and click **OK**. Do this for all remaining Security Alerts you receive during the installation. At the Step 1 window, click **Next**.
5. Place a checkmark in the box next to **Manual Installation**.
6. Specify a temporary folder to extract the database files to. This folder must be relative to the local \Lotus\Notes\Data folder. When finished, click **Next**.
7. To begin extracting the database files, click **Start**. This process will perform a Notes copy of the database files, which inherently signs and registers each file. When finished, click **Next**.
8. At step 4 click **Close**.

Create RightFax foreign domains

You can render faxes created with RightFax in Lotus Notes using one of the following two methods:

- Incorporating only the contents of the Body field on the Notes form (that is, only the body of the Notes mail memo)
- Including the body text and the Notes form itself

When a Notes user sends a fax, the fax domain name included in the destination address implicitly defines the RightFax mail router database that will process the fax and transfer it to a RightFax server for transmission. Each mail router database is limited to rendering outbound faxes from Notes in only one of the two methods listed above. The mail router database associated with the default fax domain (RFAXBODY.NSF) is configured to process only the contents of the Body field. The RightFax Mail Router (Forms) database (RFAXFORM.NSF) is used when sending faxes that include the Notes form.

To create a foreign domain document in the Public Name and Address Book on the Domino server

1. Using Domino Administrator, open the Public Name and Address Book, then click the **Configuration** tab.
2. Expand the **Messaging** twisty, then click the **Domains** view.
3. Click **Add Domain** on the action bar.
4. In the **Foreign domain name** field, enter the name of the new domain. This name is typically **RFAX** (for sending body contents only) or **RFAXFORM** (for sending body contents and Notes form).
5. Click the **Mail Information** tab. In the **Gateway server name** field enter the distinguished name of the Notes mail server where the RightFax Lotus Notes Module is installed (e.g., Server/Org). In the **Gateway mail file name** field enter the path to the mail router database (e.g., *RightFax\RFAXBODY.NSF* or e.g., *RightFax\RFAXFORM.NSF*).

6. When finished, click **Save and Close**.

To complete the installation, continue to chapter 3, “[Configuring the EFM Sync Database](#)”.

Uninstalling the Notes Module

1. On the RightFax server, open the Windows Control Panel and double-click the RightFax E-mail Gateway. The **E-mail Configuration** dialog box opens.
2. Select the Notes gateway to remove, and click **Delete Gateway**.
3. When finished, click **OK**.

To remove RightFax design elements from a user mail file

1. Open the EFM Sync database.
2. In the left pane of the EFM Sync, click **Users\By Name**.
3. In the right pane, click the name of the user or users whose mail file you wish to modify.
4. Press delete on your keyboard. This will send the user a new RightFax user options document. Upon receipt, the user must open the message entitled RightFax User Options and click the Update RightFax button. When finished, the user must close and re-open thier mail file.

Using RightFax Data Sharing with Lotus Notes

RightFax Data Sharing in a Lotus environment requires the following:

- Only one RightFax server can perform Lotus client print processing.
- Synchronizing from Notes to RightFax while using multiple EFM Sync databases, requires each EFM Sync to be configured for data sharing.
- If synchronizing from RightFax to Notes, only one EFM Sync can synchronize.

Configuring the EFM Sync to use the RightFax shared data folders

1. Log in to the EFM Sync database using a Notes ID with **Administrative Access**.
2. On the left pane, under the Servers view, click **RightFax Servers**.
3. On the right side, click your fax server name.
4. On the action bar click **Edit RightFax Server**. The RightFax server document opens.
5. Click the twisty next to **Fax Server Directories**.
6. Edit each of the paths to reflect the RightFax shared data folders.

Repeat these steps for each EFM Sync database in your organization.

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Chapter 3

Configuring the EFM Sync Database

When the Notes module is first installed, the RightFax database is replicated on the Domino server. This mirrored 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 groups, billing codes, cover sheets, overlay forms, and library documents.
- Printers
- Status reports of the RightFax server and the e-mail gateway
- Logs of sent and received faxes processed on the RightFax server and more.

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 2, “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 16](#)).
2. Configure your integration (described on [page 17](#)).
3. Add or configure user groups. (described on [page 17](#)).
4. Add users or import users from the Notes address book and configure default user settings, e.g., User Templates (described on [page 17](#)).
5. Create user routing codes (described on [page 19](#)).
6. Configure the RightFax server document establishing database synchronization between the RightFax and the Domino servers (described on [page 16](#)).
7. Configure the RightFax gateway document (described on [page 23](#)).
8. Configure RightFax server objects, such as cover sheets and billing codes (described on [page 29](#)).

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 2, "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 19](#).

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.

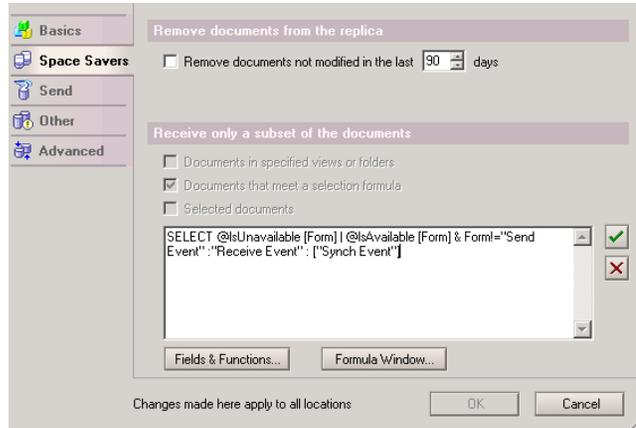
To enable selective database replication

1. In Notes, open the **EFM Sync**.
2. Select **Replication** from the **File** menu, then **New Replica**. The **Create Replica** dialog box opens.
3. Expand **Replica Settings** and click **More Settings**.
4. Click **Space Saver**, and select the check box for **Documents that meet a selection formula**.

- In the formula window create the following formula:

```
SELECT @IsUnavailable ( Form ) | ( @IsAvailable ( Form) &
Form != "Send Event" : "Receive Event" : "Sync Event" )
```

Figure 3.1 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.

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

Configuring your RightFax Integration

After installing the RightFax database files, you must configure your user integration with Notes. By default, RightFax ships with four integration profiles (called connections), each named according to the integration type it serves. Defining an integration is done on a per user basis under the Integration section of the User Options document, thus allowing multiple mail integrations in a single environment.

To create a new connection:

- Open the EFM Sync database.
- In the left pane of the EFM Sync, click **Connections**.
- On the actions bar, click **New Connection**. The New Connection document opens.
- Configure the connection document. When finished, click **Save** and **Close**.

Configuring fax user groups

The settings in this document regulate default fax options and required fax server settings for fax user groups. These groups are normally defined on the fax server and populated with fax users by the RightFax administrator.

To edit a User Group document

- Click **Groups** in the left pane of the EFM Sync database window.
- Select the group document you want to edit and click **Edit User Group** on the Notes action bar. Alternatively, you may create a new group by clicking **New User Group**.

For a description of the User Group settings, please refer to *Admin help* database.

Adding and Configuring Users

During the initial setup of RightFax with your Notes system, you must add users to the EFM Sync database.

To begin in Notes, double-click the **EFM Sync** icon to open the EFM Sync database.

Configuring User Templates

You can use the **RightFax User Options** document to configure RightFax users in the EFM Sync database.

The RightFax administrator establishes a default user template by entering data in the Default User Options document. Subsequently, each new user document is created with these values and can be customized later as needed.

When the administrator creates a user, a User Options document is placed into the user's Notes mail database, and the personal settings in the document are linked to the user's settings in the RightFax EFM Sync database. Security settings may permit the user to change some of these settings locally. When the user makes such changes, the EFM Sync database is updated automatically.

This document provides settings for the following fax features:

- Security
- Fax User identification
- Integration
- Personal Fax Preferences (including name and address book settings, fax icons, and how to convert attached files to fax format)
- Cover Sheet
- Billing Codes
- Fax Send Options
- Fax Receive Options
- Notification
- Inbound Routing
- Auto-Printing
- Pager Notifications
- Administrator Paging alerts (applies only to users with administrative permissions)
- Status

To create a user template

1. In Notes, double-click the **EFM Sync** icon. The **EFM Sync** opens.
2. In the **User Templates** view, click the **New User Template** action button. The **RightFax User Options** document opens.

For a description of the User Options settings, please refer to the *admin help* database.

Importing users from the Names and Address Book

After installing the RightFax databases, you can import users into the EFM Sync database from the Domino Names and Address Book (NAB). After importing NAB users, you can synchronize them into the RightFax database. Supported synchronization methods are listed below:

- 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.

To import users from the NAB

1. In the Notes workspace, open the EFM Sync database.
2. In the pane on the left side of the database window, under the User Integration folder, click **Users\By Name**.
3. On the action bar, click the down arrow next to **Import Users from NAB** and select **Import Users**. The Select Population Options window opens.
4. Drop down the selection box for the **Populate from NAB** selection control. Select the Domino Directory address book for your organization and click **OK**.

5. Under Other Options, select **Run silent** if you want to import users without being prompted for confirmation. This option is helpful for importing a large number of users, because you can leave the system unattended during the import process.
6. 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.
7. 8. Click **OK** to import the users. Click **Update RightFax** to finish configuring their workstations and accounts. All users must **open** and **update** the Connections document to install RightFax database files on their computers.

When you import users from the NAB, RightFax automatically mails the user options document to those users. Thus, it is recommended that you import only those groups of users whom possess the same RightFax integration type (full mail, minimal mail, or no mail). In addition, all users configured for either a full mail or minimal mail integration must open and update the user options document to enable RightFax design elements.



Note Users that fail to import are added to the list of imported users and are marked by a failed icon. To remove the failed icon, select users with a failed icon, and click the Clear failed icon for user(s) button located on the action bar.

Creating RightFax administrators

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

During the gateway installation (described in [Chapter 2, “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. The **EFM Sync** opens.
2. Click a user view and open the user who should be a RightFax administrator. Under **Security**, select **User has fax administrative rights**.
3. Save and close the user document.

Creating routing codes

Creating new fax users in the EFM Sync database by importing them from the Notes address book does not copy or create Direct Inward Dialing (DID) or Dialed Number Identification Service (DNIS) fax routing codes for the new users. You can use the DID/DNIS building tools in the EFM Sync to generate these codes automatically.

Before you create DID or DNIS fax routing codes for your users, be sure to review the three build methods available and plan to use the method that best suits your fax routing scheme. The following three

methods are available:

- The **trimming** method converts individual users' fax numbers in the RightFax database into unique routing codes. After removing any non-numeric characters (such as hyphens, parentheses, and spaces) in the fax numbers, this method defines each user's routing code as the first or last few digits in that user's fax number. You can select whether first or last digits are used and specify a number of those digits (from two to seven) to be saved as the code. The trimming method is useful for an organization that has a range of contiguous DID numbers to use as incoming fax lines, but it requires that all users' fax numbers have the same number of digits in the same positions.
- The **extraction** method retrieves specified digits from each user's fax number according to a mask (called a formula) that the administrator defines. The formula is formatted exactly as the users' fax numbers are, including non-numeric characters. One designated letter signifies a digit that must be retrieved as part of the routing code. All other characters must match a user's fax number for a code to be created for that user. The designated letter is N by default, but an administrator can change it if necessary. This method is useful where the DID or DNIS numbers are not necessarily contiguous; however, it does require that all fax numbers be as identical as possible in form, so that a few formulas can retrieve codes for all of the users.
- The **sequential** method generates new fax routing codes within parameters that the administrator specifies. Because it ignores the users' previously defined fax numbers completely, this method is especially useful for users who have not yet been assigned fax numbers.

To create DID/DNIS fax routing codes for one or more new fax users

1. In the Notes workspace, open the EFM Sync database.
2. In the pane at the left side of the database window, click **Users\By Name**.

3. In the list of fax users, click to the left of the users for whom you want to create routing codes. A check mark appears next to each user.
4. On the action bar, click the down arrow on the **Import Users from NAB ...** button and select **Create DID/DNIS for Selected Fax Users**.



Important In the next step, make sure the **Do not overwrite existing DID/DNIS entries** check box is selected unless you want to replace all existing DID and DNIS routing code information on record in the database for the selected users.

5. Using the Trimming, Extraction, and Sequential tabs in the **Build DID/DNIS** dialog box, and select the most appropriate build method for the routing codes in your organization.
6. Use the **Padding** tab to add any digits that are common to all DID or DNIS routing codes in the organization, as needed.
7. Click **OK** to exit from the Build DID/DNIS dialog.

Refreshing users' Notes mail template

If you have installed 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 the RightFax Server

When you install the RightFax database files, 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. 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.

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. On Notes workspace, double-click the **EFM Sync** icon. The **EFM Sync** opens.
2. Expand **Servers** and click the **RightFax Servers#view**. On the right, a list of your RightFax servers appears.
3. Click a listed server, followed by **Edit RightFax Server** on the action bar.
4. Under **Basics**, the server name and version appear.

Table 3a 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.

Table 3a Fax Server Information (Continued)

Field	Setting
Synchronization Logging	<p>Specify the level of information that will be written to the Synchronization Log:</p> <p>None. Records the date and time of the synchronization and the result.</p> <p>Terse (recommended). Records the success or failure of the synchronization process.</p> <p>Normal. Records details that make it useful to the average RightFax user.</p> <p>Verbose. Records details that make it useful to the RightFax administrator.</p> <p>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> <p>For a description of the log, see “RightFax Event Logs” on page 45.</p>
Synchronization Prescan Agent	The name of any Lotus Notes agent that should run prior to the synchronization.
Synchronization Postscan Agent	<p>The name of any Lotus Notes agent that should run following the synchronization.</p> <p>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.</p>

Table 3a Fax Server Information (Continued)

Field	Setting
Status Monitoring	Select the check box to enable writing fax server status documents in the EFM Sync database.
Status Interval	<p>The amount of time between the end of one status monitoring cycle and the beginning of the next.</p> <p>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.</p>

- 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.
- Under **Fax Servers to Synchronize**, specify the RightFax servers to which you want to synchronize each RightFax object.
- Under **Image Files to Synchronize**, specify whether you want to synchronize the library document, cover sheet, and fax form image files *in addition* to the object IDs. This will copy the library document, cover sheet, or fax form 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.
- Under **Fax Server Directories**, paths and data folders on the RightFax server appear.
- Under **Comments**, enter any comments you may need as documentation.

10. Click **Save and Close** to save your synchronization settings and return to the EFM Sync database.

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..

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 3b 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.

Table 3b Settings for ICD Processing (Continued)

Field	Setting
Logging	Specify the level of status information that will be written to the ICD router database. <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 3c 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.

Table 3c Settings for Inbound Faxes (Continued)

Field	Setting
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.
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.

Table 3c Settings for Inbound Faxes (Continued)

Field	Setting
New Fax Subject Line	<p>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>".</p> <p>FAX_NUMPAGES = The number of pages received.</p> <p>FAX_CSID = The sender's caller subscriber ID (CSID).</p>
New Fax From Line	<p>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>".</p> <p>FAXSERVERNAME = The name of the fax server.</p>
Include Original Subject in Completed Fax Notification	The notification to the sender will include the subject line of the sent fax.
Source for Fax Header Image	<p>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.</p> <p>The template for this data can be an .rtf file or a Notes form.</p>

Table 3c Settings for Inbound Faxes (Continued)

Field	Setting
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 3d 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	Specify the level of information that will be written to the Fax Send Log. <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. For a description of the log, see “RightFax Event Logs” on page 45.

Table 3d 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 3d 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 3d 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 3e 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	<p>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.</p> <p>Select If Needed to append cover pages for:</p> <ul style="list-style-type: none"> • Faxes held for preview. • Faxes that require approval.
Append Body Images to Log	<p>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.</p> <p>Select If Needed to append cover pages for:</p> <ul style="list-style-type: none"> • Faxes held for preview. • Faxes that require approval.

Table 3e 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*.

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.

■ ■ ■

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 For embedded codes, Captaris 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 33), 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>

Maximum field length: N/A

■ ■ ■

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.

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
BMP	Windows versions
DCX (multi-page PCX)	Microsoft Fax
EPS	If TIFF image is embedded
GIF	All versions
HTML	Versions through 4.0
JPEG (includes EXIF)	All versions
Microsoft Excel	Versions 2000 through 2007
Microsoft PowerPoint	Versions 2000 through 2007
Microsoft Rich Text Format (RTF)	All versions
Microsoft Visio (.VSD files)	2000 through 2007

Table B1 Supported Document File Formats (Continued)

Application or file format	Supported versions
Microsoft Word	2000 through 2007
Microsoft WordPad	All versions
Microsoft Works	Versions through 8.0
PCX bitmap	All versions
Portable Document Format (see note below)	All versions
Post Script	All versions
TIFF CCITT Group 3 & 4	All versions
Unicode Text	All versions
UUEncode	No specific version
UTF-8	No specific version
WordPerfect Graphics (WPG and WPG2)	Versions through 2.0



Important Conversion of PDF attachments and Postscript requires the

RightFax PDF Module.



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