



Version 8.7
Connector for FileNet P8 Guide

Edition

Information in this document applies to version 8.7 of the RightFax Connector for FileNet P8 Guide.

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AGFA **IntelliFont**

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Installing the RightFax Connector for FileNet P8

Overview of the RightFax Connector for FileNet P8

The RightFax Connector for FileNet P8 is a suite of processors and connectors that archives both sent and received fax documents from your RightFax server into a FileNet data repository. With the RightFax Connector for FileNet P8 you can:

- Send documents from your FileNet data repositories as faxes via the RightFax server.
- Automatically or manually index fax documents received via the RightFax server.
- Use capture paths to commit RightFax documents to a document data repository.
- Use Fax Entry to commit RightFax documents to a document repository.
- Print archived RightFax documents based on document data, such as the RightFax user ID, billing information, or job type (received, sent, or print job).

The RightFax Connector for FileNet P8 consists of two modules: the Connector module and the Outbound module (described in [Chapter 3, “Using the Outbound Module to Send FileNet Documents as Faxes”](#)). You can install both of these modules or either module separately, depending on the needs of your organization.

Understanding the Connector Module

The Connector module component of the RightFax Connector for FileNet P8 connects the RightFax server and FileNet Capture Professional version 4.0 or 4.1. Capture Professional is then configured to move documents from the RightFax server to the data repository of any FileNet product suite supported by your version of Capture Professional.

Documents sent from and received by the RightFax server can be archived on a system-wide or per-user basis. Once the Connector module has been installed and configured, fax documents from one or more RightFax servers will be automatically imported into your FileNet data repository.

Components of the Connector module

The Connector module consists of these components:

The RightFax Connector for FileNet P8 This is the software that allows the RightFax server to communicate with each of the connector’s components and the FileNet P8 server. This connector is installed on the RightFax server.

The External Document Connector (EDC) This is a service installed on the RightFax server during the server installation. The External Document Connector monitors RightFax for files to store in the FileNet repository. It then coordinates the activities of the other processors and connectors as fax documents are passed

into the repository. This chapter includes information on installing and configuring the External Document Connector. For a more complete description of the External Document Connector, see [Appendix A, “Understanding the External Document Connector”](#).

The RightFax Connector for Capture Professional This is the software that allows the RightFax External Document Connector to pass files into Capture Professional or to Fax Entry, which moves them into the FileNet repository. The RightFax Connector for Capture Professional is installed on a Capture Professional workstation and emulates an intelligent scanner. It bundles the RightFax documents into batches and delivers them to Capture Professional or it holds them for retrieval by Fax Entry.

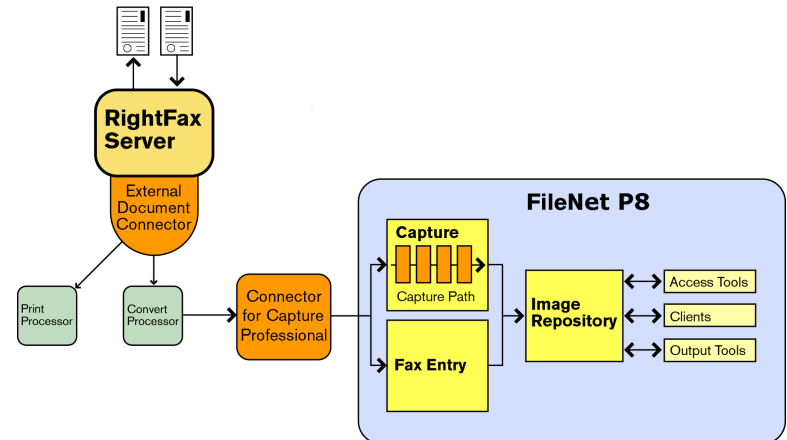
How documents are moved into the FileNet repository

Fax documents on the RightFax server are picked up by the External Document Connector and passed through the RightFax Convert processor, the RightFax Connector for Capture Professional, and the RightFax Print processor.

- The Convert processor converts the document files to the required single-page TIFF format.
- The RightFax Connector for Capture Professional organizes the fax documents into batches (including the fax images and document data that can be used for indexing purposes) and imports them into Capture Professional.
- The Print processor optionally prints the fax documents. Capture Professional then moves the fax documents into the FileNet data repository via capture paths or via Fax Entry.

The following diagram illustrates the progress of a document as it is routed from a RightFax server into a FileNet data repository.

Figure 1.1 Archiving Documents in a FileNet data repository



Installation Overview

Before you install the RightFax Connector for FileNet P8, make sure that your RightFax and FileNet P8 systems meet the following requirements:

- A RightFax server version 8.7 or higher is installed and operating.
- The Program Files/RightFax folder and all subfolders must be shared, providing access to the Capture Professional workstation which will manage incoming fax documents.
- FileNet Capture Professional version 4.0 or 4.1 must be installed on your network and must have all available patches applied.

Once you have met these requirements, complete the following steps to install and configure the RightFax Connector for FileNet P8:

1. Install the Connector on the RightFax server ([page 7](#)).
2. Activate and configure the External Document Connector on the RightFax server ([page 8](#)).
3. Install the RightFax Connector for Capture Professional on the Capture Professional workstation ([page 12](#)).
4. Optionally install and Configure the Outbound Module ([page 25](#)).

Installing the Connector on the RightFax Server

The RightFax Connector for FileNet P8 is provided on a CD separate from the RightFax installation CD. Before you install the connector on the RightFax server, make sure that RightFax server version 8.7 or higher is fully installed and running. For information on installing or upgrading your RightFax server, refer to the *RightFax Installation Guide*.

To install the connector on the RightFax server

1. Log on to the RightFax server and insert the Connector for FileNet P8 installation CD. If AutoRun is enabled, a menu of install options appears. If AutoRun is not enabled, browse the CD and run AutoRun.exe.
2. In the menu of install options, select **Install the Connector on the RightFax Server**. The Connector for FileNet P8 install wizard opens.
3. Click **Next** at the opening screen to view the RightFax license agreement. You must accept the license agreement in order to continue the installation. Click **Next**.
4. Click **Install**. When the installation is complete, click **Finish**.

5. When you are prompted to restart the computer, click **Yes**.

Activating and Configuring the External Document Connector

The External Document Connector (EDC) is a RightFax module that allows two-way communication between the RightFax server and FileNet P8. After you install the Connector for FileNet P8 on the RightFax server, you must activate the External Document Connector on the RightFax server and set some configuration options. These instructions provide only the information necessary to activate and configure the External Document Connector. For a more complete description of the External Document Connector, see [Appendix A, "Understanding the External Document Connector"](#).

Installing the External Document Connector

The External Document Connector is installed as an optional component on the RightFax server. If you did not select the External Document Connector option when you ran the RightFax server installation, it must be installed now.

To install the External Document Connector

1. Run Add/Remove Programs from Windows Control Panel, highlight **RightFax Product Suite**, and then click **Change**.
2. Click **Next** at the opening screen. This opens a list of installation options. Select **Modify** and click **Next**.
3. On the **Setup Features** screen, expand the **RightFax Server** category and select **External Document Connector (EDC)** for install. Click **Next**.
4. Complete the Installation Wizard according to the instructions in the *RightFax installation Guide*.
5. When you are prompted to reboot the computer, click **Yes**.

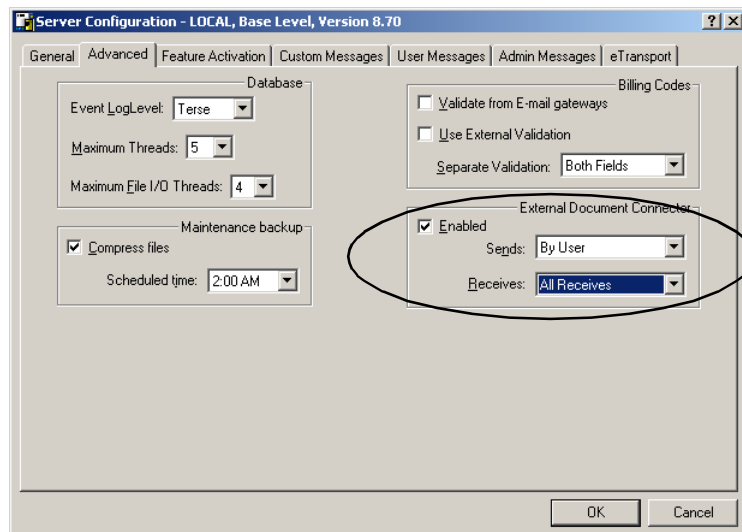
Activating the External Document Connector in the RightFax Server Configuration

As soon as it is activated on the RightFax server, the External Document Connector will begin queuing fax documents for delivery to the RightFax Connector for FileNet P8. These fax documents will remain queued but unprocessed until you complete the installation and configuration of all of the connector components.

To activate the External Document Connector

1. On the RightFax server, run Enterprise Fax Manager.
2. In the list of RightFax servers in the left pane, select the RightFax server on which the Connector for FileNet P8 software is installed.
3. In the list of services in the bottom pane, double-click **RightFax Server Module**. This opens the **Server Configuration** dialog box. Click the **Advanced** tab.

Figure 1.2 Activating the External Document Connector



4. Under **External Document Connector**, click the **Enabled** check box.
5. In the **Sends** and **Receives** boxes, specify the types of fax documents you want to archive with FileNet P8. You can archive fax documents that have been both transmitted via the RightFax server (the **Sends** option) and received into the RightFax server (the **Receives** option).
 - **Disabled.** These fax documents will not be archived.
 - **By User.** Only specific RightFax users that have this feature enabled in their user records will have their fax documents archived (described in the next section).
 - **All Sends/Receives.** All fax documents of this type will be archived.
6. Click **OK**.

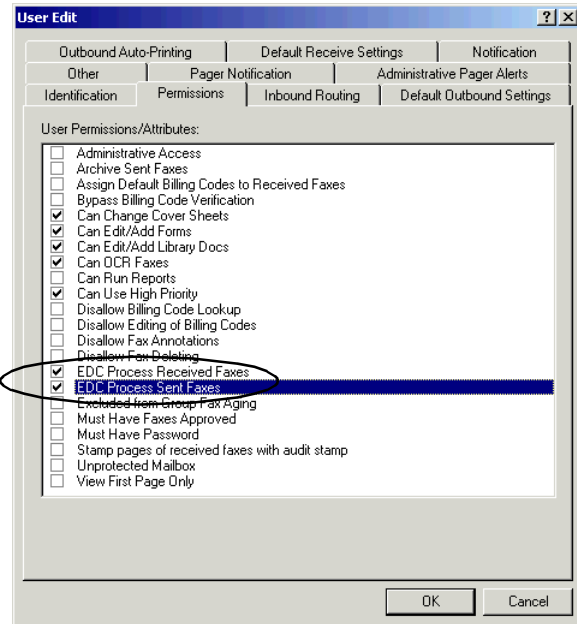
To archive fax documents on a per-user basis

If you select **By User** in either the **Sends** or **Receives** boxes in the **Server Configuration** dialog box (described in the previous section), you must configure each individual RightFax user for access to FileNet Image Services.

1. Run Enterprise Fax Manager.
2. Click **Users** under the appropriate RightFax server in the list of fax servers in the left pane.

3. Double-click the user to edit. The **User Edit** dialog box opens. Click the **Permissions** tab.

Figure 1.3 Selecting the EDC Processing Options



4. Select the **EDC Process Received Faxes** check box if you want this user's received fax documents to be archived. Select the **EDC Process Sent Faxes** check box if you want this user's sent fax documents to be archived. RightFax users do not have an option to override these settings in the RightFax client applications.
5. Click **OK** and repeat for each RightFax user whose fax documents should be archived.

Configuring the External Document Connector

The External Document Connector does not *require* any configuration to correctly process and archive users' fax documents from the RightFax server. However, some configuration is required if you want to automatically print archived fax documents or create custom filters that limit the range of documents that are archived or printed. In addition, the External Document Connector lets you generate sample fax jobs that can be used for configuring FileNet P8 to index fax documents based on RightFax-specific document data (such as user name or billing codes).



Warning The Connector for FileNet P8 configuration in the External Document Connector includes a FlowPoint called **Convert_To_TIFF**. The configuration for this FlowPoint lets you set the format of the file that will be picked up by Capture Professional or Fax Entry. By default this is set to **Single-page TIFF**. You must not change this setting. If the External Document Connector does not convert the files to single-page TIFF format, Capture Professional and Fax Entry will be unable to retrieve the file.

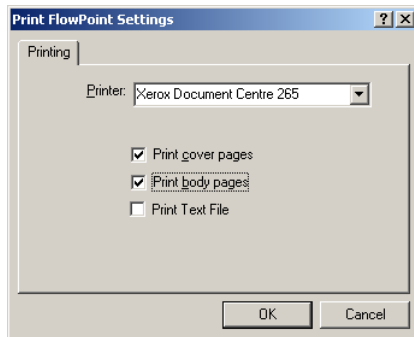
For an overview of the External Document Connector, see [Appendix A, "Understanding the External Document Connector"](#). For a description of each option in the External Document Connector, click the **[?]** icon in the title bar and then click the option you want defined.

To configure the External Document Connector to print archived faxes

1. In Windows Control Panel, run the **RightFax EDC** program.
2. Click **Data Flows**. This opens a list of modules that have been activated in the External Document Connector.
3. Expand the **FileNet_Panagon/P8** option in the list. This displays all of the FlowPoints for FileNet P8 job processing.
4. Select **FP#3 Print_Images**. A list of configuration options opens in the right pane.

5. Click **Configure FlowPoint**. This opens the **Print FlowPoint Settings** dialog box.

Figure 1.4 The Print FlowPoint Settings dialog box



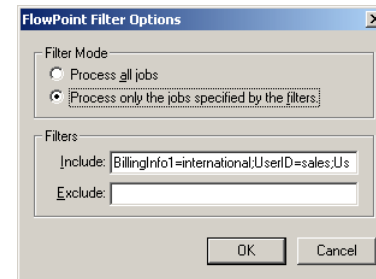
6. Select a printer and then specify which fax document components to print.
7. Click **OK**.

To create filters that limit the range of archived and printed faxes

1. In Windows Control Panel, run the **RightFax EDC** program.
2. Click **Data Flows**. This opens a list of modules that have been activated in the External Document Connector.
3. Expand the **FileNet_Panagon/P8** option in the list. This displays all of the FlowPoints for FileNet P8 job processing.
4. Select **FP#1 Convert_To_TIFF** to filter the faxes that will be archived, or click **FP#3 Print_Images** to filter the faxes that will be automatically printed. The remaining filter instructions apply to creating filters for both processes. When you select one of these FlowPoints, a list of configuration options opens in the right pane.

5. Click **Configure Filter**. This opens the **FlowPoint Filter Options** dialog box.

Figure 1.5 The FlowPoint Filter Options dialog box



By default, the **Process all jobs** option is selected and no filters are set up, so all documents will be processed.

6. To create a filter, specifying either which jobs should be explicitly included or explicitly excluded, select **Process only the jobs specified by the filters**.
7. Under **Filters**, specify filter keywords.
 - If you want to process only the jobs that meet your filter criteria, specify filter data in the **Include** box.
 - If you want to process most jobs, but specifically *exclude* jobs that meet your filter criteria specify filter data in the **Exclude** box.

Criteria in the **Exclude** box will be evaluated by the connector first, and it will override criteria in the **Include** box.

The keywords and data are not case-sensitive. To enter a string of keywords and data, type a semicolon between each keyword and value pair. The semicolon acts as a logical OR statement, so documents that meet any one of your keyword criteria will be filtered.

To filter documents, the data values for the keyword must match the RightFax document data. For example, to import all documents that include the user ID “sales,” documents with the user ID “sales23” will not be imported.

You can create filters based on any keyword in the job file. You can view many of these keywords by opening the sample sent and received fax job files you create with the External Document Connector. The steps to generate these sample fax jobs are on [page 11](#). The sample job files are saved in the Program Files\RightFax\EDC\Processors\FileNet folder and can be viewed with any text editor. These files are numbered consecutively and have the extension .job. The following table lists some of the keywords most commonly used for creating filters.

Table 1a Common keywords used for filtering

| Keyword | Description | Example |
|------------------------------|---|---|
| BillingInfo1 BillingInfo2 | Billing information from the RightFax document. | billinginfo1=marketing |
| GenericFlag1 GenericFlag2 | If an application in your enterprise is customized to work with the RightFax API, this keyword refers to the API constants FAXFLAG_GENERIC1 and FAXFLAG_GENERIC2. The value for the keyword is true or false. | genericflag1=true genericflag1=false |
| JobType | Job types are: <ul style="list-style-type: none"> • SendJob • ReceiveJob • PrintJob | jobtype=sendjob |

Table 1a Common keywords used for filtering (Continued)

| Keyword | Description | Example |
|------------------------|--|------------------------------|
| RemoteCSID RemotelD | The remote caller subscriber ID (CSID) of the RightFax document. | remotelD=5550022 |
| UniqueID | The unique ID of the document, assigned by the RightFax server. | uniqueID= SAR3D64FD3F1D16 |
| UserID | The RightFax user ID of the person who sent the document. | userid=sales |

Example

BillingInfo1=international;UserID=sales;UserID=marketing

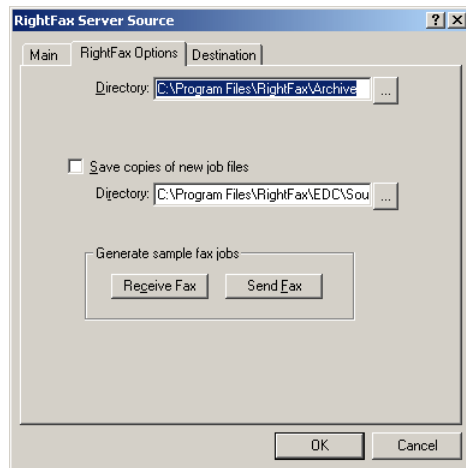
8. When you have completed the **FlowPoint Filter Options** dialog box, click **OK**.

To generate sample fax jobs for configuring indexing

1. In Windows Control Panel, run the **RightFax EDC** program.
2. Click **Sources**. This opens a list of modules that have been activated in the External Document Connector.
3. Select **RightFax Server** and click **Edit**. This opens the **RightFax Server Source** dialog box.

4. Click the **RightFax Options** tab.

Figure 1.6 The RightFax Options tab



5. Click both the **Receive Fax** and **Send Fax** buttons. Sample fax jobs will be generated for use in configuring indexing on the FileNet P8 server.
6. Click **OK** and then close the External Document Connector program.

Installing the RightFax Connector on a Capture Professional WorkStation

After the External Document Connector has been activated and configured as necessary, you must install the RightFax Connector for Capture Professional. The RightFax connector supports Capture Professional version 4.0 and 4.1.

The RightFax Connector for Capture Professional organizes the fax documents into batches (including the fax images and document data that can be used for indexing purposes) and imports them into Capture Professional.

To install the RightFax Connector on a Capture Professional WorkStation



Caution Captaris recommends that the RightFax Connector for Capture Professional not be installed on the RightFax server, even if the RightFax server has Capture Professional installed.

1. Log on to the Capture Professional workstation.
2. Map a drive to the shared Program Files\RightFax folder on the RightFax server.
3. Insert the Connector for FileNet P8 installation CD. If AutoRun is enabled, a menu of install options appears. If AutoRun is not enabled, browse the CD and run AutoRun.exe.
4. In the menu of install options, select **Install the RightFax Connector for Capture Professional on a Capture Professional Workstation**. The Connector for FileNet P8 install wizard opens.
5. Click **Next** at the opening screen to view the RightFax license agreement. You must accept the license agreement in order to continue the installation. Click **Next**.
6. Click **Install**. When the installation is complete, click **Finish**.

To add the RightFax.ocx Capture Professional component

1. On the same Capture Professional workstation where you installed the RightFax Connector for Capture Professional, open the FileNet P8 Capture Manager.
2. Click **Add** next to the **Components** list. The **Add Capture Component** dialog box opens.
3. Navigate to the RightFax folder under the Capture\Programs folder and select the component file RightFax.ocx.
4. Click **Close** to close the FileNet P8 Capture Manager.

Configuring the RightFax Connector for Capture Professional

You have the following options for customizing the RightFax Connector for Capture Professional:

- “Specifying the volume of documents to process” (page 13).
- “Defining which documents to import based on document data filters” (page 14).

Specifying the volume of documents to process

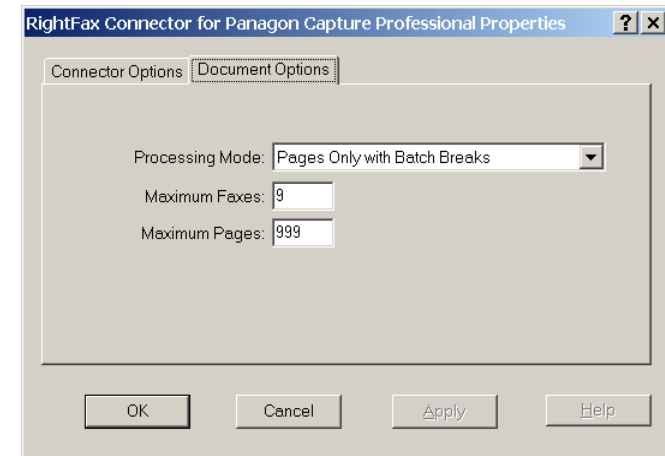
Capture Professional requires that all documents be archived in the form of batches. Batches are distinct groups of documents and document data that have been formatted for Capture Professional. You can specify the format of batches to process and number of RightFax documents in each batch.

To configure batches of documents

1. In Capture Professional, select your settings collection for RightFax fax documents (to set the default configuration for all batches) or select an individual batch (to configure that batch only).
2. Select **Tools > Configure > RightFax Fax**. The **RightFax Connector for Panagon Capture Professional Properties** dialog box opens.

3. Click the **Document Options** tab.

Figure 1.7 Selecting a Capture Professional Processing Mode



Processing Mode The RightFax Connector for Capture Professional can create three types of batches for delivery to Capture Professional:

- **Pages Only with Batch Breaks.** This option creates a batch for each fax. This processing mode requires assembly before documents can be passed to the repository.
- **Pages Only with Document Breaks.** This option creates multiple fax documents under the batch in which they were originally received. This processing mode requires assembly before documents can be passed to the repository.
- **Document/Page.** This option creates multiple fax documents under the batch in which they were originally received and does not require assembly before documents can be passed to the repository.

Note Because the Document/Page processing mode is exceptionally demanding on system resources, this option should only be used if you are unable to use the other two processing modes.



Maximum Faxes This is the maximum number of fax documents that will be pulled from the job folder at one time. Enter a number from 1 to 20.



Tip If the batch already contains faxes, the number of faxes you enter in this box will be added to the existing faxes in the batch.

Maximum Pages This is the maximum number of individual fax pages that will be pulled from the job folder at one time. Enter a number from 1 to 999.

- When you have completed the **RightFax Connector for Panagon Capture Professional Properties** dialog box, click **Apply**, and then click **OK**.

Defining which documents to import based on document data filters

The RightFax Connector for Capture Professional organizes RightFax documents into batches and imports them into Capture Professional. You can create a filter that limits the documents to import based on RightFax document data, such as a RightFax user ID or billing code.

To specify criteria for documents to import

- In Capture Professional, select your settings collection for RightFax fax documents (to set the default configuration for all batches) or select an individual batch (to configure that batch only).
- Select **Tools > Configure > RightFax Fax**. The **RightFax Connector for Panagon Capture Professional Properties** dialog box opens.

Figure 1.8 Setting the Connector Properties

- Click the **Connector Options** tab.
- To specify documents that should be imported from this connector based on RightFax document characteristics, select a filter mode.
 - All Filtering.** Select this option if all documents should be imported.

- **Cooperative Filtering.** Select this option to allow multiple capture paths to monitor one job directory for documents. With cooperative filtering, jobs remain stored in the job directory until they are imported by one of the RightFax Connectors for Capture Professional. Criteria for importing documents are based on keywords you specify in the **Include Filter** and **Exclude Filter** boxes.

Cooperative filtering is used if you want to use different filters. Unlike Exclusive filtering, Cooperative filtering will not delete a job that doesn't meet its filter criteria. The job stays in the job directory until it is picked up by the appropriate filter.

If you select Cooperative filtering, Captaris recommends creating a catch-all filter that periodically picks up any jobs that do not meet other filter criteria. For example, if you have one filter configured as "UserID=TechSupport" and another configured as "UserID=Sales," there should be a third catch-all filter that has "UserID=TechSupport;UserID=Sales" for its **Exclude** settings and a blank **Include** setting. This filter will pick up any jobs that don't happen to be for TechSupport or Sales so they don't remain unprocessed in the job directory indefinitely.

- **Exclusive Filtering.** Select this option if a single connector will evaluate and import files from this job directory. Criteria for importing documents are based on keywords you specify in the **Include Filter** and **Exclude Filter** boxes. The connector evaluates the filter criteria, and it imports the documents that meet the criteria. If the filter criteria are not met by the document, the connector passes the document to the RightFax Print processor.

You should select Exclusive filtering if you want to process only certain jobs and throw away anything that doesn't meet the filter criteria. You may have more than one workstation running in this mode *only* if they have identical filters.

5. Under **Filters**, specify filter keywords.

- If you want to process only the jobs that meet your filter criteria, specify filter data in the **Include Filter** box.
- If you want to process most jobs, but specifically *exclude* jobs that meet your filter criteria specify filter data in the **Exclude Filter** box.

Criteria in the **Exclude Filter** box will be evaluated by the connector first, and it will override criteria in the **Include Filter** box.

The keywords and data are not case-sensitive. To enter a string of keywords and data, type a semicolon between each keyword and value pair. The semicolon acts as a logical OR statement, so documents that meet any one of your keyword criteria will be filtered.

To filter documents, the data values for the keyword must match the RightFax document data. For example, to import all documents that include the user ID “sales,” documents with the user ID “sales23” will not be imported.

You can create filters based on any keyword in the job file. You can view many of these keywords by opening the sample sent and received fax job files you create with the External Document Connector. The steps to generate these sample fax jobs are on [page 11](#). The sample job files are saved in the Program Files\RightFax\EDC\Processors\FileNet folder and can be viewed with any text editor. These files are numbered consecutively and have the extension .job. The following table lists some of the keywords most commonly used for creating filters.

Table 1b Common keywords used for filtering

| Keyword | Description | Example |
|------------------------------|---|---|
| BillingInfo1 BillingInfo2 | Billing information from the RightFax document. | billinginfo1=marketing |
| GenericFlag1 GenericFlag2 | If an application in your enterprise is customized to work with the RightFax API, this keyword refers to the API constants FAXFLAG_GENERIC1 and FAXFLAG_GENERIC2. The value for the keyword is true or false. | genericflag1=true genericflag1=false |
| JobType | Job types are: <ul style="list-style-type: none"> • SendJob • ReceiveJob • PrintJob | jobtype=sendjob |

Table 1b Common keywords used for filtering (Continued)

| Keyword | Description | Example |
|------------------------|--|------------------------------|
| RemoteCSID RemotelD | The remote caller subscriber ID (CSID) of the RightFax document. | remotelD=5550022 |
| UniqueID | The unique ID of the document, assigned by the RightFax server. | uniqueID= SAR3D64FD3F1D16 |
| UserID | The RightFax user ID of the person who sent the document. | userid=sales |

Example

If there are three Capture Professional workstations and you want to capture Sales faxes only on one workstation, Marketing faxes only on another station, and all other faxes on the third workstation, the filters should be set up as follows:

- The Sales workstation would have UserID=Sales in the **Include Filters** box. The **Exclude Filters** box is left empty.
 - The Marketing workstation would have UserID=Marketing in the **Include Filters** box. The **Exclude Filters** box is left empty.
 - The third catch-all workstation would have UserID=Sales;UserID=Marketing in the **Exclude Filters** box. The **Include Filters** box is left empty.
6. When you have completed the **RightFax Connector for Panagon Capture Professional Properties** dialog box, click **Apply**, and then click **OK**.



Configuring Capture Professional to Commit Documents to FileNet Data Repositories

Supported FileNet Product Suites

FileNet P8 is comprised of several unique product suites that store and manage your documents and data. The RightFax Connector for FileNet P8 can be used to store RightFax documents in the data repositories of any FileNet product suite supported by your version of Capture Professional.

For example, Capture Professional version 4.0 supports these product suites:

- Image Services
- Content Services

Capture Professional version 4.1 supports these additional product suites:

- Image Manager Suite
- Content Manager Suite
- Web Content Manager Suite
- Business Process Manager Suite

These are the content management systems that let you receive faxes from the RightFax server directly into your FileNet document repository.

Support for the Capture Professional Fax Entry Feature

The RightFax Connector for FileNet P8 supports the Capture Professional Fax Entry feature. With a few exceptions, the instructions for configuring the connector to work with Fax Entry the same as those for the FileNet product. The instructions are provided in this chapter.

Fax Entry commits three types of data to a repository and/or to a specific local or network directory. Each type of data is described in the following table.

Table 2a Data That Is Processed by Fax Entry

| Data | Description |
|--------------------------------------|--|
| Inbound faxes | Fax Entry accepts faxes from a remote location through a fax server. |
| Imported files | Fax Entry processes all files it finds in a specified directory. |
| Journal entries created by Fax Entry | Fax Entry creates a journal log, recording events that occur as inbound faxes or imported files are processed. |

Creating a Capture Path to Move Fax Documents into the Repository

Capture paths automate the process of committing documents into a FileNet data repository after they have been received by Capture Professional. If you are using Fax Entry to commit fax documents to the FileNet data repository, capture paths are not required.

The instructions provided here create a capture path that commits all available RightFax documents to a FileNet data repository. Other capture path configurations can be created to meet the needs of your organization.

To create a capture path for RightFax fax documents

In this procedure you must specify a repository to which the capture path will commit fax documents. This can be either a new or an existing repository. If you want to use a new repository, create the repository before beginning this procedure. For information on creating a new repository, refer to the documentation for your FileNet product suite.

1. Run Capture Professional and select the repository in which you will be storing fax documents.
2. Select **File > New > Capture Path**. The FileNet P8 Capture Path wizard opens. Click **Next** on the introductory screen.
3. Select the repository where you want inbound fax documents to be stored. Click **Next**.
4. In the **Name** box under **Define New Capture Path**, type a name for the new capture path. Leave the remaining options unchanged and click **Next**.

5. Move the following capture path components from the **Components** list into the list under the name of your new capture path in the exact order they are listed here:

- **RightFax Fax**
- **Assembly**
- **Index**
- **Commit**



Note The *Assembly* component is unnecessary if you select *Page/Document* as your processing mode (see “[Configuring the RightFax Connector for Capture Professional](#)” on page 13).

6. When you are finished moving the capture path components, click **Next**. This opens the **Capture Path Layout** window (a type of flow chart illustrating the data flow through your capture path).
7. Check the **Maximize** option.
8. Ensure that the added components are laid out in this order:
Begin → Fax → Assembly → Index → Commit → End



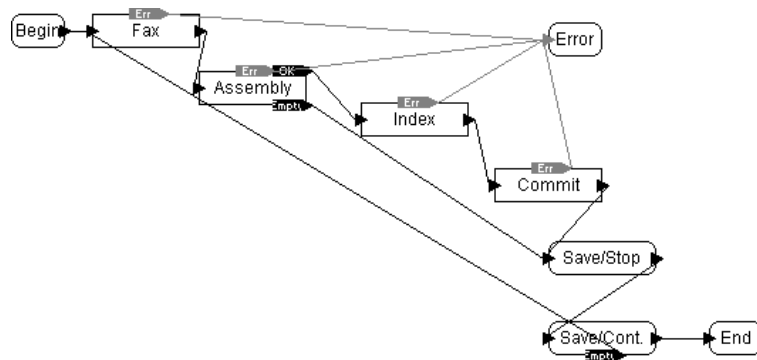
Note *Begin* and *Fax* are the only required components of a path for RightFax documents. This capture path commits all available RightFax documents to the data repository.

9. Click **Save/Stop** to add a new **Save/Stop** object between the **Commit** and **End** objects.
10. On the **Assembly** object, locate the box labeled **Empty**. Position the cursor over this box until the cursor changes to a double-arrow. Drag the box from the **Assembly** object to the **Save/Stop** object.
11. Click **Save/Cont.** to add a new **Save/Cont.** object between the **Save/Stop** and **End** objects.

- On the **Save/Cont.** object, locate the box labeled **Empty**. Position the cursor over this box until the cursor changes to a double-arrow. Drag the box from the **Save/Cont.** object to the **Fax** object.

The final diagram should look like this:

Figure 2.1 The Completed Capture Path Layout



- Click **Next**.
- Finally, click **Finish** to close the FileNet P8 Capture Path wizard.

Configuring Capture Professional to Work with the RightFax Connector

To configure the RightFax Connector for Capture Professional, you must create and configure a new settings collection and template for RightFax documents. As described in [“Installing the RightFax Connector on a Capture Professional WorkStation”](#) (page 12), you may have installed one or multiple capture paths and settings collections on one or more Capture Professional workstations.

To create a new settings collection

In this procedure you will configure several settings under the data repository where you want inbound fax documents to be stored. This can be either a new or existing repository. If you want to use a new repository, create the repository before beginning this procedure. For information on creating a new repository, refer to the documentation for your FileNet product suite.

- Run Capture Professional.
- Under the **Config** container in the repository where you want inbound fax documents to be stored, click **Settings**.
- Select **File > New > Settings**. The FileNet P8 Capture settings wizard opens. Click **Next** on the introductory screen.
- Select the repository where you want inbound fax documents to be stored. Click **Next**.
- Under **Define new Settings Collection**, in the **Name** box, type a name for the new settings collection. Leave the remaining options unchanged and click **Next**.
- If you created a new document class for indexing (described [page 20](#)), select the document class name and click **Next**.
- On the component configuration screen, select **RightFax Fax** and click **Configure**. The **RightFax Connector for Capture Professional Properties** dialog box opens.
- In the **Connector Name** box, enter the name for this connector in this settings collection. You can define unique connectors for settings collections.
- If you are configuring the Connector to work with Fax Entry, in the **Polling Interval in Minutes** box, enter the interval that Fax Entry will poll the connector for documents. Enter a number of minutes.

- In the **Job Directory** box, type the path to the Panagon folder on the source RightFax server. Type the UNC path to a folder on the server or the absolute path to the folder on the local computer. Click **Apply**, and then click **OK**.



Note This step is required to enable communication between the RightFax source server and the Capture module. There are several additional options in this dialog box that let you customize the operation of the connector. For a complete description of all of the options in this dialog box, see “[Configuring the RightFax Connector for Capture Professional](#)” on page 13.

Figure 2.2 Specifying the Path to the Panagon Folder on the Source RightFax Server

- Click **Next**, and then click **Finish** to close the FileNet P8 Capture settings wizard.

To create a new template

- In Capture Professional, under the **Config** container, click **Templates**.
- Select **File > New > Template**. The FileNet P8 Capture template wizard opens. Click **Next** on the introductory screen.

- Select the repository where you want inbound fax documents to be stored. Click **Next**.
- Under **Define new Settings Collection**, in the **Name** box type a name for the new template. Leave the remaining options unchanged and click **Next**.
- On the available settings collections screen, select the name of the settings collection you created in the previous steps and click **Next**.
- Select one of the following options:
 - If you are configuring a template for Fax Entry, click **Next** to skip this step.
 - If you have configured a capture path for RightFax fax documents (described on [page 18](#)) select the capture path in the **Capture Path** box and click **Next**.
- Finally, click **Finish** to close the FileNet P8 Capture template wizard.

Enabling Fax Document Indexing in a FileNet Product Suite

If you want to automatically index fax documents when they are committed to a data repository, you must specify the data fields you want indexed and link those fields to the data that is included with RightFax fax documents.



Important These instructions are specific to FileNet Image Services. If you are using the Connector for FileNet P8 to commit documents to a data repository in a different product suite, you may want to review these instructions and apply the principles for document indexing to your specific product suite.

Manual indexing also is available in Capture Professional. Refer to the Capture Professional documentation for more information.



To enable fax document indexing

Note *The following instructions assume that you have access to and are familiar with the FileNet Image Services server. If you need further information on any of the dialog boxes or options described in this section, refer to your FileNet documentation.*

1. On the Image Services server, run Application Executive.
2. Select **Applications > Database Maintenance** to open the **Database Maintenance** dialog box.
3. Select **Families > Define/Update Family**. The **Define/Update Media Families** dialog box opens.
4. Complete this dialog box according to your organizational requirements. The family you configure here will contain a new document class for RightFax fax documents. You can either create a new family or select an existing family.
5. When the **Define/Update Media Families** dialog box is completed, select **File > Save** to save the settings, and then **File > Exit** to return to the **Database Maintenance** dialog box.
6. Select **Indexes > Define/Update Index**. The **Define/Update Index** dialog box opens.
7. For each data field that you want to index, complete the entries in this dialog box according to your organizational requirements. The index fields you add here must correspond to (but do not need to have the same names as) the data fields that are included with RightFax fax documents. For a list of the RightFax document data fields, see [Appendix B, "RightFax Document Data Fields"](#).
8. When the **Define/Update Index** dialog box is completed, select **File > Save** to save the settings, and then **File > Exit** to return to the **Database Maintenance** dialog box.
9. Select **Classes > Define/Update Class**. The **Define/Update Class** dialog box opens.
10. Complete the entries in this dialog box according to your organizational requirements. The document class you configure here will be used for all RightFax fax documents archived in your Image Services system.
11. When the **Define/Update Class** dialog box is completed, select **File > Save** to save the settings.
12. Select **Index > Edit**. The **User Defined Index** dialog box opens.
13. Add each of the index fields you created in step 7.
14. When all of the index fields have been added, click **Cancel**, and then click **Close** to return to the **Database Maintenance** dialog box.
15. Select **File > Save** to save the settings and then **File > Exit** to close the **Database Maintenance** dialog box.
16. Finally, stop and then restart the Image Services server. This step is required for the changes to take effect.

Mapping RightFax Document Data to the FileNet Index

In this procedure you will use a sample RightFax document to map available data fields to indexing fields you set up on the Image Services server for RightFax fax documents.

This is required only if you set up your Image Services server to index archived RightFax fax documents (described on [page 20](#)).

To map RightFax data to your index

1. If you did not have already followed the instructions for generating sample faxes from the External Document Connector (described in the section entitled “[To generate sample fax jobs for configuring indexing](#)” on [page 11](#)), follow those steps now. This creates sample fax documents that act as templates when setting up fields for indexing.
2. On the Capture Professional workstation, run Capture Professional.
3. Select the new setting you created in the previous step and select **Tools > Start > RightFax Fax**.



Note When you added the RightFax component, a Fax button was added to the Capture Professional toolbar. Clicking this button is the same as selecting **Tools > Start > RightFax Fax**.

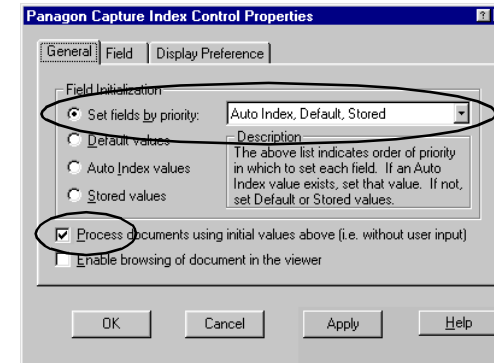
4. Click the settings collection you created for RightFax fax documents and select **Tools > Configure > Index**. The **Panagon Capture Index Control Properties** dialog box opens.
5. On the **General** tab, click **Set fields by priority**, and then select **Auto Index, Default, Stored** in the list.



Note These instructions provide information on options required to enable indexing of RightFax document data only. For more information on the options on each tab of this dialog box, refer to your FileNet documentation.

6. If you set up a capture path to automate moving fax documents into the repository (described on [page 18](#)), select the **Process documents using initial values above** check box.

Figure 2.3 Setting the Field Priority

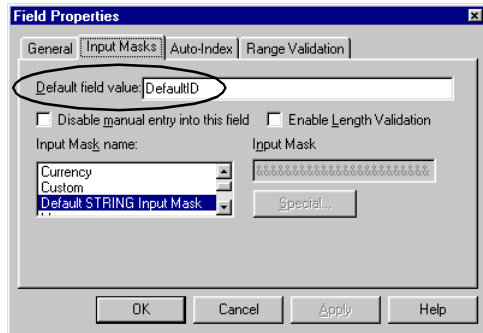


7. Click the **Field** tab.
8. Select the first index field in the list and click **Configure**. The **Field Properties** dialog box opens.

9. Click the **Input Masks** tab.

- In the **Default field value** box, type a value that will populate this index field if the data is unavailable in the RightFax fax document.

Figure 2.4 Setting the Default Field Value

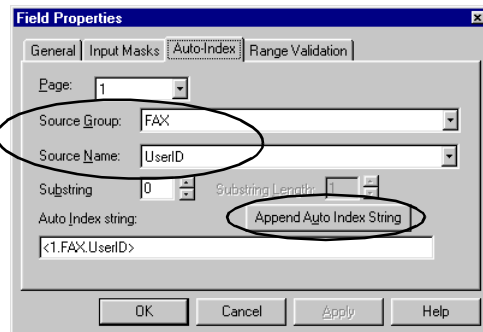


- Click **OK**. Repeat these steps for each index field listed in the **Panagon Capture Index Control Properties** dialog box.
- When each index field in the **Panagon Capture Index Control Properties** dialog has been configured, click **Apply**, and then click **OK** to close the dialog box.

■ ■ ■

- Click the **Auto-Index** tab.
- In the **Source Group** box, select **FAX**.
- In the **Source Name** box, select the field from the RightFax document that corresponds to the index field you are mapping.
- Click **Append Auto Index String**. An index string appears in the **Auto Index string** box.

Figure 2.5 Creating the Auto-Index String



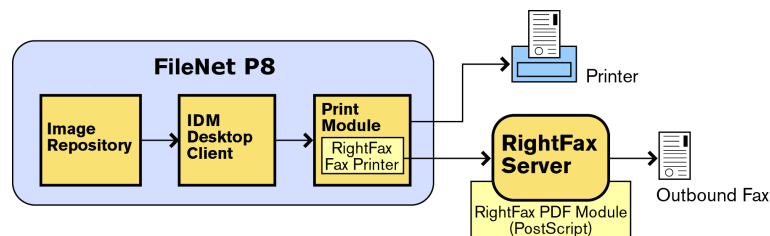
Using the Outbound Module to Send FileNet Documents as Faxes

The RightFax Connector for FileNet P8 can be used to send images from a FileNet data repository as faxes via the RightFax server. This component of the RightFax Connector for FileNet P8 is called the “Outbound module,” because documents are transmitted as faxes from your data repository.

With the Outbound module, the RightFax server is configured as a generic fax printer on a FileNet Print server. When a user prints to this RightFax printer from the IDM desktop client, the user is prompted for fax addressing information (fax number, recipient name, etc.), and then the image and addressing information are sent to the RightFax server for transmission.

The following diagram illustrates the process of faxing a document from a FileNet product Suite via a RightFax server.

Figure 3.1 Faxing a Document Via the RightFax Server



Installing and Configuring the Outbound Module

To upgrade to the RightFax Outbound Module from any previous version, you must first uninstall the old version using Add/Remove Programs in Windows Control Panel. When you uninstall the Outbound module, all of the module settings and configurations will be removed. Captaris recommends that you make a note of the settings before you uninstall it.

Before you install the Outbound module of the RightFax Connector for FileNet P8, make sure that your RightFax and FileNet systems meet the following requirements:

- The RightFax server must be version 8.7 or higher.
- FileNet Print version 4.2 or 4.3 must be installed and configured on a FileNet Print server on your network.

To install and configure the Outbound module, complete the following steps:

1. Install the RightFax Outbound module on the FileNet Print server (described on [page 26](#)).
2. Create the RightFax printer (described on [page 26](#)).
3. Start FileNet Print Administrator (described on [page 29](#)).
4. Start FileNet Fax Manager (described on [page 30](#)).

Installing the Outbound Module on the FileNet Print Server

This step installs the Outbound module on your FileNet Print server. If you have more than one FileNet Print server on your network, you must follow these installation instructions on each server that you want to support faxing via RightFax.

To install the Outbound module

1. On the FileNet Print server, insert the Connector for FileNet P8 CD. If AutoRun is enabled, a menu of install options appears. If AutoRun is not enabled, browse the CD and run AutoRun.exe.
2. In the menu of install options, select the option **Install the Outbound Module on a Panagon Print server**.
3. Follow the instructions on the screen.
4. When the Setup program is complete, click **Finish**.

Creating the RightFax Printer

After you have installed the Outbound module on the FileNet Print server, you must create a RightFax fax printer. Documents printed to this printer will be routed to the RightFax server for transmission.

Creating the RightFax printer requires these basic steps:

1. Create the RightFax printer on the FileNet product suite server (described on [page 26](#)).
2. Configure the RightFax print queue on the Print server (described on [page 27](#)).

Creating the RightFax printer on the FileNet product suite server



Important These instructions are specific to FileNet Image Services. If you are creating a RightFax printer in a different product suite, you may want to review these instructions and apply the principles for creating the RightFax printer in your specific product suite.

1. On the Image Services server, run the FileNet P8 Configuration Editor by selecting **Start > Programs > FileNET IMS Configuration > Configuration Editor**. The **Open Configuration Database** dialog box opens.
2. Enter the database and domain name of the Image Services server to configure. Verify that the **Read-only** option is *not* selected, and click **OK**. This opens the FileNet IMS System Configuration Editor.
3. Click the **Procedures** tab.
4. Select **Add a Printer**, and then click **Run**. The **Add a Printer** dialog box opens.
5. Select **WorkFlo/Fax 3.0** as the printer type, and then click **Next**.
6. Type a name for the new RightFax printer, and click **Next**.
You cannot include spaces in the name of the printer. Substitute underscores or other characters for spaces in the printer name (for example, RightFax_Fax_Printer).
7. Enter the IP address of the FileNet Print server, and then click **Next**.
8. Select the paper sizes to support, and then click **Next**.
9. Select the fax resolutions to support, and then click **Next**.
10. Specify if you want to set the printer as the default printer, and then click **Next**.
11. When you see the message “Edit procedure completed successfully,” click **OK**.

12. To confirm the new printer has been successfully added, click the **Printing** tab. The new printer should appear in the list of available printers.
13. Close the FileNet IMS System Configuration Editor. Click **Yes** when you are prompted to save the changes.
14. Restart the Image Services server.

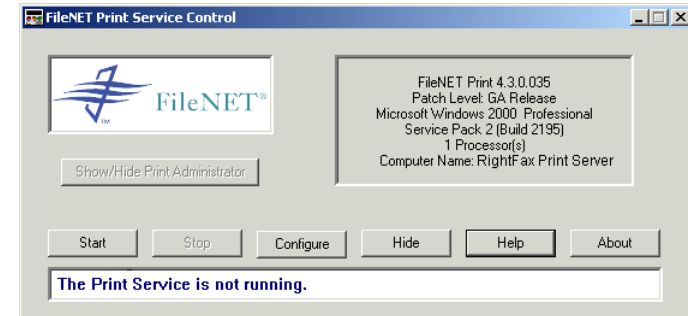
Configuring the RightFax print queue on the FileNet Print server

This step configures the RightFax print queue on the FileNet Print server to communicate with the RightFax server. All documents sent to the RightFax server via this RightFax print queue will be associated with a single RightFax user ID. The properties and permissions of this user ID will be used for all outbound faxes sent from the Image Services repository. Although any existing user ID will work for this purpose, you may want to create a special RightFax user ID dedicated to faxes originating from FileNet P8 users.

If a document is created with PostScript fonts, then it must be sent to the RightFax server from the FileNet Print server with the fonts. In this step, you will specify that fonts be downloaded with the document.

1. On the FileNet Print server, select **Start > Programs > FileNET Print > FileNET Service Control**. The **FileNet Print Service Control** dialog box opens.

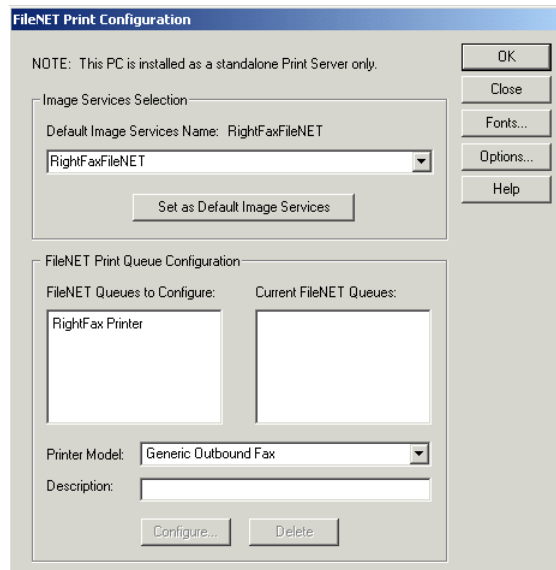
Figure 3.2 The FileNet Print Service Control Dialog Box



- Click **Configure**, and the **Print Configuration** dialog box opens. Complete the following steps:

- Configure the RightFax print queue (described on [page 28](#)).
- Configure font downloading (described on [page 29](#)).

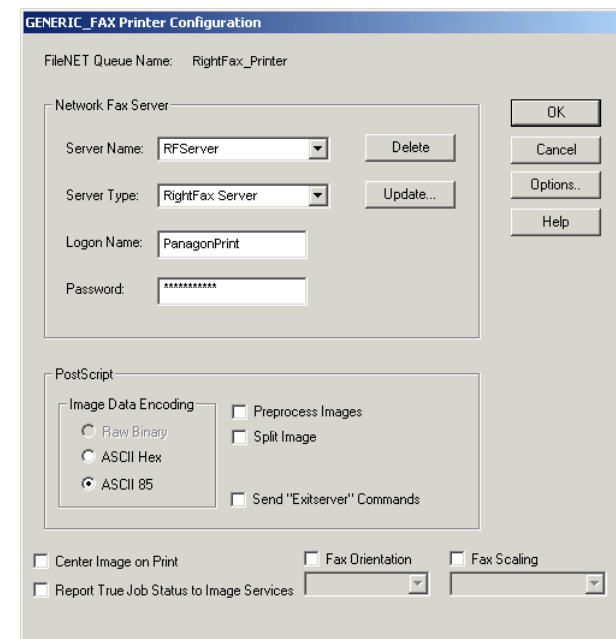
Figure 3.3 The Print Configuration Dialog Box



To configure the RightFax print queue

- In the **Print Configuration** dialog box, under **IDMIS Selection** (in Print 4.2) or **Image Services Selection** (in Print 4.3), select the domain name for the Print server you are configuring. The name of the RightFax printer you created on the Image Services server appears in the **FileNET Queues to Configure** list.
- Select the RightFax printer name and click **Configure**. The **Generic Fax Printer Configuration** dialog box opens.

Figure 3.4 The Generic Fax Printer Configuration Dialog Box



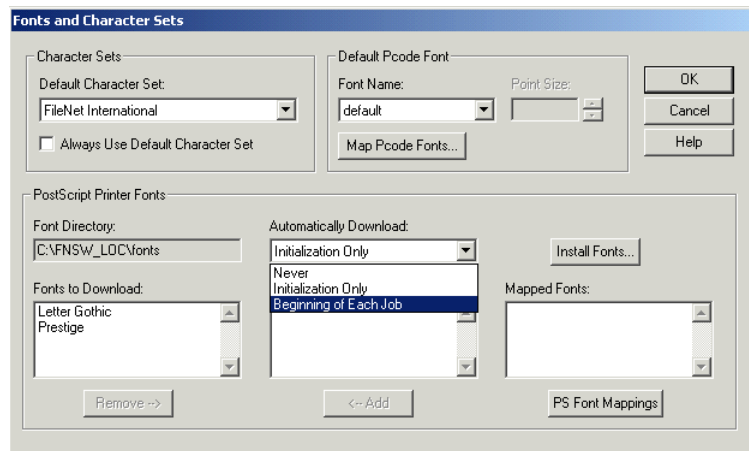
- In the **Server Name** box, enter the name of the RightFax server.
- In the **Server Type** box, select **RightFax Server**.
- In the **Logon Name** box, type the name of a RightFax user ID. This is the user ID on the RightFax server that all outbound faxes will be assigned to.

6. In the **Password** box, type the password for the RightFax user ID you entered in the **Logon Name** box.
7. Under **PostScript**, verify that the **Send "Exitserver" Commands** check box is *not* selected. Click to clear the check box.
8. Complete the remaining entries in this dialog box according to your requirements. When you are done, click **OK**. The **Generic Fax Printer Configuration** dialog box closes.

To download fonts

1. In the **Print Configuration** dialog box, click **Fonts**. The **Fonts and Character Sets** dialog box opens.

Figure 3.5 The Fonts and Character Sets Dialog Box



2. Under **PostScript Printer Fonts**, in the **Automatically Download** list, click **Beginning of Each Job**.
3. Complete the remaining entries in this dialog box according to your requirements. When you are done, click **OK**. The **Fonts and Character Sets** dialog box closes.

Starting FileNet Print Administrator

FileNet Print Administrator monitors the FileNet product suite server and picks up print requests for printers configured on the Print server.

Starting FileNet Print Administrator in FileNet Print 4.2

In FileNet Print 4.2, FileNet Print Administrator is an application that monitors the product suite server and picks up print requests for printers configured on the Print server. FileNet Print Administrator must remain running on the Print server in order to continually monitor the product suite server. After you start FileNet Print Administrator, it can be minimized, but do not close the application.

To start FileNet Print Administrator, select **Start > Programs > FileNET Panagon Server Applications > Panagon Print Administrator**.

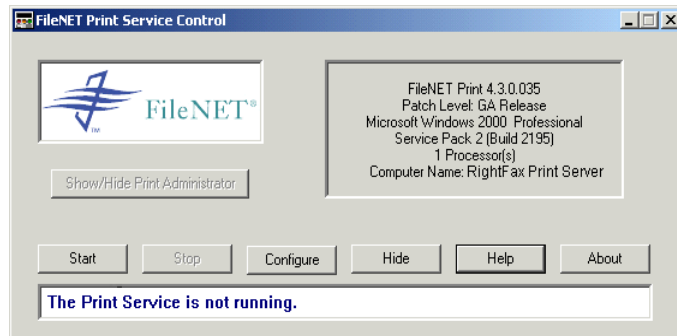
Starting FileNet Print Administrator in FileNet Print 4.3

In FileNet Print 4.3, the FileNet Print service is a Windows NT service that monitors the product suite server and picks up print requests for printers configured on the Print server. The FileNet Print service must remain running on the Print server in order to continually monitor the product suite server.

To start the FileNet Print service

1. Select **Start > Programs > FileNET Print Service Control**.
The FileNet Print Service Control dialog box opens.

Figure 3.6 The FileNet Print Service Control Dialog Box



2. Click **Start**.

Starting FileNet Fax Manager

FileNet Fax Manager requests and processes fax addressing information for print jobs sent to fax printers. It must remain running on the Print server in order to process print jobs sent to fax printers. After you start FileNet Fax Manager, it can be minimized, but do not close the application.



Tip The FileNet Fax Manager screen may need to be refreshed in order to get the status of RightFax faxes from the RightFax server.

Starting FileNet Fax Manager in FileNet Print 4.2

To start FileNet Fax Manager in FileNet Print 4.2, select **Start > Programs > FileNET Panagon Server Applications > Panagon Fax Manager**.

Starting FileNet Fax Manager in FileNet Print 4.3

To start FileNet Fax Manager in FileNet Print 4.3, select **Start > Programs > FileNET Print > Fax Manager**.

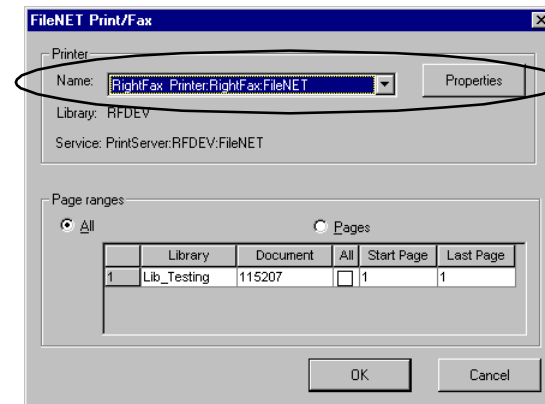
Sending a Fax via RightFax from the IDM Viewer

Once the RightFax printer is created and properly configured, you are ready to send faxes from the IDM Viewer.

To send a fax from the IDM Viewer

1. On any FileNet P8 client computer, run FileNet IDM Viewer.
2. Load an image from the data repository.
3. Select **File > FileNET Print/Fax**. The FileNET Print/Fax dialog box opens.

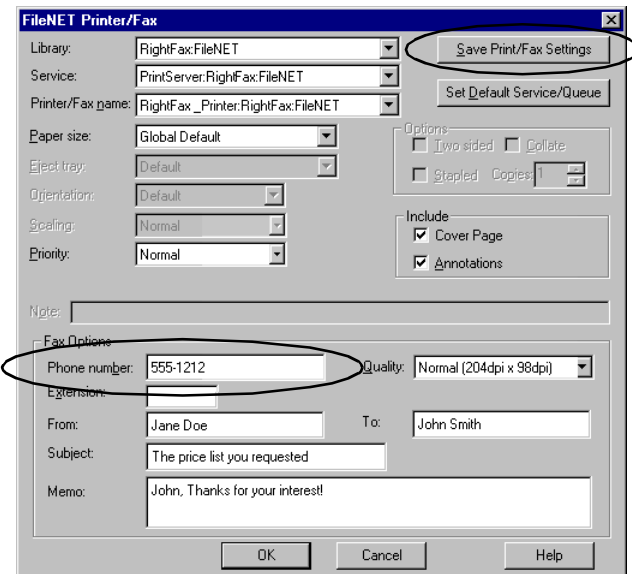
Figure 3.7 Selecting the RightFax Printer



4. In the **Name** box, select the name of your RightFax printer.

5. Click **Properties**. The **FileNet Printer/Fax** dialog box opens.

Figure 3.8 Entering Fax Addressing Information



6. Under **Fax Options**, in the **Phone number** box, type the destination fax number. This is a required entry. All other entries are optional. The text you enter in the **From**, **To**, **Subject**, and **Memo** boxes will appear on the fax cover sheet.

If you enter a subject in the **Subject** box, it will appear in the Notes section of the RightFax cover sheet along with any text you enter in the **Memo** box.

7. When you have completed the fax addressing information, click **Save Print/Fax Settings**.
8. Click **OK** to send the fax.

■ ■ ■

Appendix A

Understanding the External Document Connector

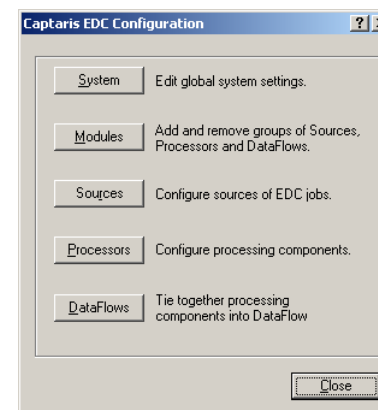
The External Document Connector is a component of the RightFax server that monitors the server for fax documents to process and pass to the RightFax Connector for Capture Professional. The External Document Connector processes documents using a set of steps called a “DataFlow.” The DataFlow is comprised of several distinct processes called “FlowPoints.” Each FlowPoint monitors a specific folder for fax documents, acts on the documents, and then passes them on to the next FlowPoint.

Running the External Document Connector Configuration Program

The External Document Connector configuration program is installed as an application in Windows Control Panel. It is installed as an optional component of the RightFax server installation (described on [page 7](#)).

To run the External Document Connector configuration program, open Windows Control Panel and double-click the **RightFax EDC** program icon. This opens the **Captaris EDC Configuration** dialog box.

Figure 3.9 The Captaris EDC Configuration dialog box



Each of the configurable components of the External Document Connector are listed in the buttons on this dialog box. Click a button to configure the component.

For a description of each option in the External Document Connector, click the **[?]** icon in the title bar and then click the option you want defined.

System Click this button to edit the event logging level of the External Document Connector, as well as specify the location of the key folders on the RightFax server if you are running the External Document Connector on a remote computer.

Modules Click this button to add the optional modules (such as the Connector for FileNet P8) that are controlled by the External Document Connector.

Sources Click this button to configure the data sources that the External Document Connector will monitor for jobs to process.

Processors Click this button to configure the scan intervals and logging levels of individual processors and to pause processors managed by the External Document Connector.

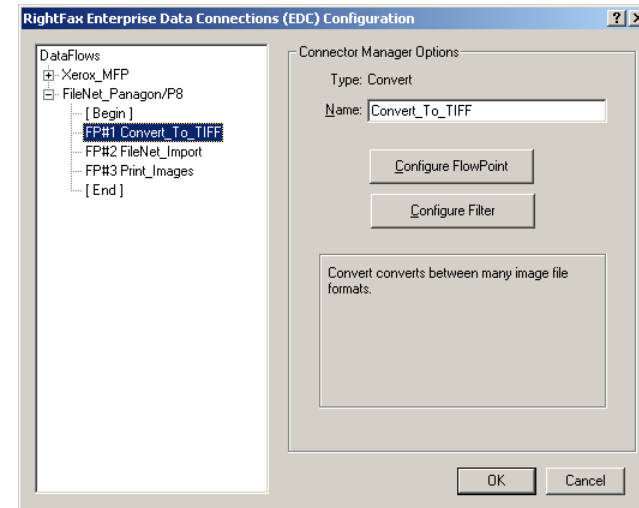
DataFlows Click this button to configure the DataFlows and individual FlowPoints that control the processing of jobs between the RightFax and the external data source.

Understanding DataFlows and FlowPoints

A DataFlow is a set of individual FlowPoints. Each module that you have installed which is controlled by the External Document Connector has a DataFlow. Click the **DataFlows** button in the

Captaris EDC Configuration dialog box to open a list of DataFlows. Click [+] next to each DataFlow to display its FlowPoints.

Figure 3.10 The list of DataFlows in the External Document Connector



FlowPoints are the individual processes performed by the External Document Connector that are required to process your jobs. Different DataFlows will have different sets of FlowPoints, with the exception that each DataFlow has a [Begin] and [End] FlowPoint. These are the initial and final steps required by the External Document Connector for all modules.

Each of the module-specific FlowPoints can be configured by selecting the FlowPoint and clicking **Configure FlowPoint**. Each FlowPoint corresponds to a processor and has a unique set of configuration options. For a description of each option in the FlowPoint Configuration dialog boxes, click the [?] icon in the title bar and then click the option you want defined.

Running the EDC Monitor

The External Document Connector includes a management tool called the External Document Connector Monitor (EDC Monitor). Use the EDC Monitor to monitor the status of the connectors and processors under the control of the EDC, add and delete processor services, and configure the EDC components.



Caution The EDC Monitor application does not display errors that occur with individual processors. It will only report specific job files that have encountered errors. To check for errors in the External Document Connector's processors, you must review the Event Log.

To open the EDC Monitor, on the RightFax server where the External Document Connector is installed select **Start > Programs > RightFax EDC Monitor**. The **EDC Monitor** program window opens.

Figure 3.11 The External Document Connector Monitor

The screenshot shows the EDC Monitor application window titled "EDC Monitor - Connected to EDC Manager on LOCAL". The window has a menu bar with "File", "View", "Tools", and "Help". The main area is divided into two panes. The left pane shows a tree view of components under "Components". The right pane is a table with columns: "Status", "Processed", "Pending", "Errors", and "Activity".

| Components | Status | Processed | Pending | Errors | Activity |
|--|--------|-----------|---------|--------|----------|
| Processors | | | | | |
| Convert | ok | | | | |
| Instance #01 | ok | | | | Idle |
| Instance #02 | ok | | | | Idle |
| Instance #03 | ok | | | | Idle |
| FileCopy | ok | | | | |
| Instance #01 | ok | | | | Idle |
| GenText | ok | | | | |
| Instance #01 | ok | | | | Idle |
| Print | ok | | | | |
| Instance #01 | ok | | | | Idle |
| RFSend | ok | | 1 | | |
| Instance #01 | ok | | | | Idle |
| RFSendStatus | ok | | | | |
| Instance #01 | ok | | | | Idle |
| XeroxPrint | ok | | | | |
| Instance #01 | ok | | | | Idle |
| FileNet | ok | | | | |
| DataFlows | | | | | |
| Xerox_MFP | | | | | |
| Begin | ok | 1 | | | |
| FlowPoint #1 - xxx | ok | | | | |
| FlowPoint #2 - Monitor_RightFax_Fax_Status | ok | | | | |
| FlowPoint #3 - Generate_History_File | ok | | | | |
| FlowPoint #4 - Print_Notification | ok | | | | |
| End | ok | | | | |
| FileNet_Panagon/P8 | | | | | |
| Begin | ok | | | | |
| FlowPoint #1 - Convert_To_TIFF | ok | | | | |
| FlowPoint #2 - FileNet_Import | ok | | | | |
| FlowPoint #3 - Print_Images | ok | | | | |
| End | ok | | | | |

Each of the External Document Connector components is displayed in a hierarchical tree in the left pane. The status of each component is displayed in the right pane. The following table defines each of the status columns in the right pane.

Table A1 EDC Monitor Status Definitions

| Column heading | Definition |
|----------------|--|
| Status | The External Document Connector component's status. Possible values are: <ul style="list-style-type: none"> Failed - The component has shut down. Hung - The component is no longer responding. Job Errors - Errors prevented the image from processing. OK - The image was processed successfully. |
| Processed | The total number of fax images that have been processed by this component. |
| Pending | The total number of jobs currently queued for processing by this component. |
| Errors | The total number of processing errors that have been logged by this component. |
| Activity | The current active state of the component. Possible values are: <ul style="list-style-type: none"> Idle - The component is currently inactive. Paused- The component has been paused. No jobs will be processed. Processing Job- The component is currently processing a job. Shut Down- The component service is currently stopped. |

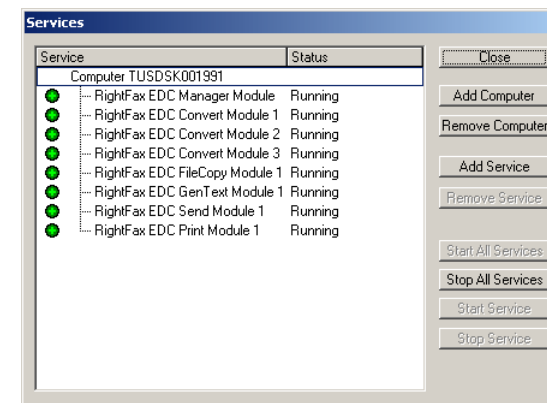
Monitoring the Processor Services

The External Document Connector EDC Manager component and all of the individual processors managed by the External Document Connector are installed as services on the computer running the External Document Connector. The External Document Connector Monitor includes a tool that can be used to view the status of these services and add and remove services.

To monitor the status of the External Document Connector processor services

1. On the RightFax server, select **Start > Programs > Captaris EDC Monitor**. This opens the External Document Connector management and monitoring tool.
2. Select **Tools > Services**. This opens the **Services** dialog box.

Figure 3.12 The Services Dialog Box



This dialog box displays the status of the EDC Manager service (which controls all of the processors) as well as the status of the individual processors. You must have at least one RightFax EDC Manager Module service and one RightFax EDC Convert Module service running for the Connector for FileNet P8 to store fax documents in your FileNet data repository.

To start or stop a service, select the service name and click **Start Service** or **Stop Service**. To start or stop all of the services, select the computer name at the top of the list and click **Start All Services** or **Stop All Services**.

Adding and removing services

The most processor-intensive step when archiving RightFax fax documents in a FileNet data repository is the conversion from the RightFax proprietary document format to the single-page TIFF files required by Capture Professional. This conversion is performed by the Convert processor. To increase the speed and efficiency of document conversion, you can install and run additional instances of this connector on one or more computers on your network. Although the automatic printing performed by the Print processor is less processor intensive than the Convert processor, you can install and run multiple instances of this connector as well.

You can run a maximum of 16 of each type of processor. These processors can be run on the same computer that runs the External Document Connector (the RightFax server) or on remote computers to take advantage of the additional processor power.



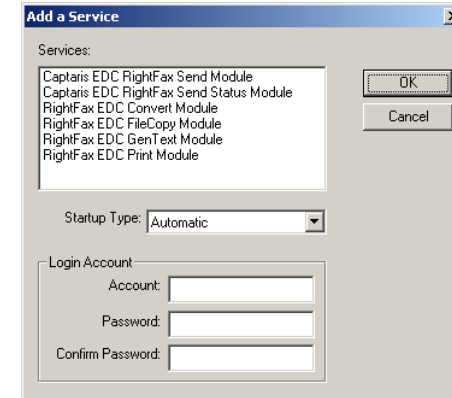
Note Although it is possible to install and configure more than 16 of each type of processor, only 16 of each will actually function at any given time.

To add new instances of a processor

1. Run the EDC Monitor and select **Tools > Services** to open the **Services** dialog box.
2. If you want to add the service to a remote computer that is not listed, click **Add Computer** and specify the name of the remote computer.

3. Select the computer to which you want to add the service and click **Add Service**. This opens the **Add a Service** dialog box.

Figure 3.13 The Add a Service Dialog Box



4. Under **Services**, select the type of service to add.
5. Under **Login Account**, enter the user name and password of the user account that the service will use to start up. This user account should have full administrative privileges to the computer you selected in step 3.
6. Click **OK**.



Note If you are adding processors to a remote computer and you receive the message "EDC Manager has not been properly configured to allow services to be installed," or if the services fail to start, see the following section on adding processes to a remote computer.

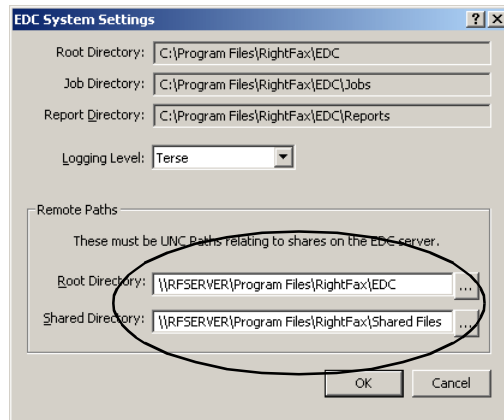
If you are adding processors to a remote computer

To run External Document Connector processors, a remote computer must know how to locate certain folders on the RightFax server used by the processors. You must enter the share names of

these folders in the RightFax External Document Connector Manager Configuration before you will be able to run the processor on remote computers.

1. Run the EDC Monitor and select **Tools > Configuration** to open the **Captaris EDC Configuration** dialog box.
2. Click the **System** button. This opens the **EDC System Settings** dialog box.

Figure 3.14 Specifying the remote paths that let you add processes to remote computers



3. In the **Root Directory** box, enter the UNC path to the share name of the RightFax\EDC folder on the computer on which the External Document Connector is installed (the RightFax server).

Example \\RFSEVER\Program Files\RightFax\EDC

4. In the **Shared Directory** box, enter the UNC path to the share name of the RightFax\Shared Files folder on the computer on which the External Document Connector is installed (the RightFax server).

Example \\RFSEVER\Program Files\RightFax\Shared Files

To remove processors

1. Run the EDC Monitor and select **Tools > Services** to open the **Services** dialog box.
2. Select the service name.
3. Click **Stop Service**.
4. When the service is stopped, click **Remove Service**.

■ ■ ■

Appendix B

RightFax Document Data Fields

The following table lists the data fields that are included with each RightFax fax document that can be used to index fax documents that have been archived in an Image Services repository.

- The data field column lists each RightFax document data field. On the Image Services server, the corresponding index fields are not required to use field names that are identical to these.
- The field type and maximum length are needed when you configure data fields in the FileNet Image Services system.
- The fax type indicates whether the data is included with sent or received faxes. Some data is included with sent faxes only, some data is included with received faxes only, and some data is included with both sent and received faxes.

Table B1 RightFax Document Data Fields

| Data field | Field type | Max. length | Fax type | Description |
|-------------------|-------------------|--------------------|-----------------|--|
| BillingInfo1 | String | 15 | Sent | Billing code 1, if defined on the RightFax server. |
| BillingInfo2 | String | 15 | Sent | Billing code 2, if defined on the RightFax server. |
| CallerID | String | 21 | Received | The RightFax user ID of the mailbox where the fax was received. This data is available if the fax board supports it. |
| Caller Station ID | String | 21 | Received | The caller subscriber ID (CSID) of the recipient fax machine. |
| Date | Date | N/A | Sent/Received | The date that the fax was sent or received. The date is stored in the format YYYY/MM/DD. |

Table B1 RightFax Document Data Fields (Continued)

| Data field | Field type | Max. length | Fax type | Description |
|------------------------|---------------|-------------|---------------|---|
| DateTime | Special | N/A | Sent/Received | The date and time that the fax was sent or received. The data is stored in the format YYYY/MM/DD HH:MM:SS. |
| DID/DTMF/ANI | String | 21 | Received | The DID or DTMF code or the ANI routing data for the RightFax user who received the fax (if defined on the RightFax server). |
| FaxAttributes | String | Variable | Sent/Received | A custom string displaying key attributes of the fax in the format "FaxAttributes (<i>Attribute, Attribute, ...</i>)". Available attributes are: <ul style="list-style-type: none"> • Broadcast • Gateway • Production • InternetLink • WinFax |
| Fax Channel | Integer | N/A | Received | The channel number on the RightFax server on which the fax was received. |
| Fax Server | String | 31 | Received | The name of the RightFax server where the fax was received. |
| FromCompanyFaxNumber | String | 31 | Sent | The fax number of the sender's organization. |
| FromCompanyVoiceNumber | String | 31 | Sent | The voice number of the sender's organization. |
| FromFaxNumber | String | 31 | Sent | The sender's personal fax number. |
| FromName | String | 99 | Sent | The sender's name. |
| FromVoiceNumber | String | 31 | Sent | The sender's personal voice number. |
| Job ID | Unsigned long | 15 | Received | The ID of the fax assigned by the RightFax External Document Connector (EDC) component of the RightFax Connector for FileNet P8. |
| JobType | String | Variable | Sent/Received | The type of fax: <ul style="list-style-type: none"> • Send • Receive • Print • Unknown |
| NumberOfImages | Integer | N/A | Sent/Received | The total number of pages in the fax (including the cover page). |

Table B1 RightFax Document Data Fields (Continued)

| Data field | Field type | Max. length | Fax type | Description |
|---------------------|--------------------|--------------------|-----------------|--|
| PageNum | Integer | N/A | Sent/Received | The page number of the fax. The first fax page is page 1. For sent faxes, the cover page (if any) is assigned page number 0. |
| Receive Time | COleDateTime | N/A | Received | The time that the fax was received. The format of the date and time is based on the local machine settings. |
| Receive Time String | String | N/A | Received | The date and time that the fax was received. The data is stored in the format MM/DD/YYYY HH:MM:SS. The time is stored in 24-hour format. |
| RemoteCSID | String | 21 | Sent/Received | The caller subscriber ID (CSID) of the remote fax machine. |
| SendDuration | Integer | N/A | Sent/Received | The number of seconds required to transmit the fax. |
| Time | Special | N/A | Sent/Received | The time that the fax was sent or received. The time is stored in 24-hour format as HH:MM:SS. |
| ToCityState | String | 59 | Sent | The city and state of the fax recipient. |
| ToCompany | String | 59 | Sent | The name of the recipient's organization. |
| ToFaxNumber | String | 31 | Sent | The destination fax number. |
| ToName | String | 59 | Sent | The fax recipient's name. |
| ToVoiceNumber | String | 31 | Sent | The fax recipient's voice number. |
| Transmission Status | String | 35 | Received | Status of the transmission (success or error). |
| Transmission Type | Integer enumerated | 5 | Received | Fax image resolution (normal or fine). |
| UniqueID | String | 15 | Sent/Received | The unique ID of the fax assigned by the RightFax server. |
| UserID | String | 21 | Sent/Received | For sent faxes, the RightFax user ID of the sender. For received faxes, the RightFax user ID of the recipient. |

■ ■ ■

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