



Version 8.7  
Gateway for Lotus Notes Guide

## Edition

Information in this document applies to version 8.7 of the Gateway for Lotus Notes Guide.

## Trademarks

Captaris and RightFax are trademarks of Captaris, Inc. All other company names, brand names, and product names are the property and/or trademarks of their respective companies.

## Copyright Notice

©2004 Captaris, Inc. All rights reserved.

Captaris  
10885 NE 4th Street  
Suite 400  
Bellevue, WA 98004  
(425) 455-6000  
<http://www.captaris.com>

No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form by any means without the written permission of Captaris, Inc.

Information in this document is subject to change without notice. Companies, names, and data used in examples herein are fictitious unless otherwise noted.

## **AGFA** **IntelliFont**

JetPCL PCL Emulation Software copyright 1990-2003 Tech Know Systems, Ltd. Company, All rights reserved. Portions copyright ©1999 Ligature. All rights reserved. Portions copyright ©1988, 1996 Aladdin Enterprises. All rights reserved. Portions copyright ©1993 Soft Horizons. All rights reserved. Outside In® Viewer Technology copyright ©1992-2003 Inso Corporation. All rights reserved. Copyright © TMS, Inc. 1994-2002. All rights reserved. Portions copyright ©2001 artofcode LLC. Portions Copyright ©1996, 2001 Artifex Software Inc. Portions Copyright ©1998 Soft Horizons. All Rights Reserved. Adobe, Acrobat, and the Acrobat logo are trademarks of Adobe Systems Incorporated. Includes Adobe® PDF Library technology. All rights reserved. PostScript is a trademark of Adobe Systems Incorporated. This software is based in part on the work of the Independent JPEG Group.

# Contents

Chapter 1	<b>Installing the Gateway for Lotus Notes..... 5</b>	Chapter 3	<b>Using Notes to Send and Receive Faxes .....37</b>
	Understanding the RightFax and Notes Integration Options ..... 6		Sending a Fax.....37
	Faxing Notes Forms..... 8		Using the Fax Information Dialog Box..... 38
	Activating the Gateway for Lotus Notes..... 8		Previewing Faxes .....41
	Adding and Configuring the Gateway for Lotus Notes Service.....8		Forwarding Faxes.....41
	Selecting a Service Account for Network Access..... 9		Receiving Notice that a Fax is Undeliverable .....41
	Starting and Stopping the Gateway Service..... 10		Using RightFax Embedded Codes in Mail Messages.....42
	Installing the Databases for Full Notes Mail Integration..... 10		Composing and Sending a Fax When Working Offline.....42
	Installing the Databases for Minimal Notes Mail Integration..... 14		Editing Your RightFax User Options in Notes .....43
	Installing the Databases for No Notes Mail Integration..... 17	Chapter 4	<b>RightFax Logs and Reports in Lotus Notes .....45</b>
	Extracting the Install Databases to Prepare for Manual Installation ..... 19		RightFax Event Logs .....45
	Handling Undeliverable Faxes..... 19		RightFax Status Reports .....47
	Uninstalling the Gateway ..... 20	Appendix A	<b>E-mail Compatible Embedded Codes .....49</b>
Chapter 2	<b>Configuring the EFM Sync Database..... 21</b>	Appendix B	<b>File Formats that Convert to Fax Format..... 55</b>
	Understanding EFM Sync Database Security ..... 22		
	Configuring the RightFax Server ..... 22		
	Configuring the RightFax Gateway Document ..... 25		
	Configuring RightFax Objects in Notes..... 31		
	Adding and Configuring Users ..... 31		
	Configuring Users for E-mail Notification of Received Faxes..... 35		
			<b>Index.....57</b>



## Chapter 1

# Installing the Gateway for Lotus Notes

The RightFax Gateway for Lotus Notes provides inbound and outbound faxing via RightFax directly from the Notes client application. The RightFax Gateway for Lotus Notes and the 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.

The RightFax Gateway for Lotus Notes installs several RightFax-specific databases on the Domino server. One of these databases (Rf80sync.nsf or “EFM Sync”) is a mirror of the RightFax database. Because the RightFax database is stored on both servers, RightFax configuration and administration can be performed on either server and then updated periodically on the other.

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

1. Install the RightFax server (described in the *RightFax Installation Guide*).
2. Choose the type of integration you want for your RightFax and Notes system (described on [page 6](#)).
3. Activate the RightFax Gateway for Lotus Notes (described on [page 8](#)).
4. Install the RightFax Gateway for Lotus Notes and the installer database (described on [page 8](#)).
5. Use the installer database to install the database files for your RightFax integration (described later in this chapter).
6. Configure the RightFax server document in Notes (described in [Chapter 2, “Configuring the EFM Sync Database”](#)).
7. Configure the RightFax gateway document in Notes, establishing database synchronization between the RightFax and the Domino servers (described in [Chapter 2, “Configuring the EFM Sync Database”](#)).
8. Configure RightFax objects in Notes, such as cover sheets and billing codes (described in [Chapter 2, “Configuring the EFM Sync Database”](#)).
9. Configure users (described in [Chapter 2, “Configuring the EFM Sync Database”](#)).

### Upgrading to RightFax 8.7 from another version

You may upgrade to RightFax 8.7 only from RightFax 8.5. For all other prior versions, you must either install RightFax 8.7 new or first upgrade to RightFax 8.5. For instructions on upgrading to RightFax 8.7 from 8.5, refer to the RightFax customer support Web site <http://www.rightfax.com/support/>.

## Understanding the RightFax and 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.

Table 1a RightFax Integration Options

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

Table 1a RightFax Integration Options (Continued)

Integration option	How users send faxes	Installation features
Minimal Notes Mail integration	A RightFax mail template for faxes allows Notes users to design and address memos and attachments as outbound faxes.	Locally stores the Notes databases required by the gateway. These are moved to the Domino server by automated database copy and replication methods. Makes no modifications to any Notes mail template. Modifies each fax user's mail database. Locally installs a fax factory database where fax mechanics reside. For more information on the fax factory database, see <a href="#">"Understanding the fax factory"</a> on <a href="#">page 6</a> .
No Mail integration	The standard Notes Memo form and RightFax embedded codes (that users type into the body of the memo) allow users to send memos as faxes.	Locally stores the Notes databases required by the gateway. These are moved to the Domino server by automated database copy and replication methods. 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.

### Understanding the fax factory

If you choose minimal Notes Mail integration, RightFax will install fax factory databases that improve the efficiency of the Domino server by moving fax composition tasks to the user's computer. A

local fax factory database is installed on each client computer, and a central fax factory template database is installed on the Domino server.

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

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

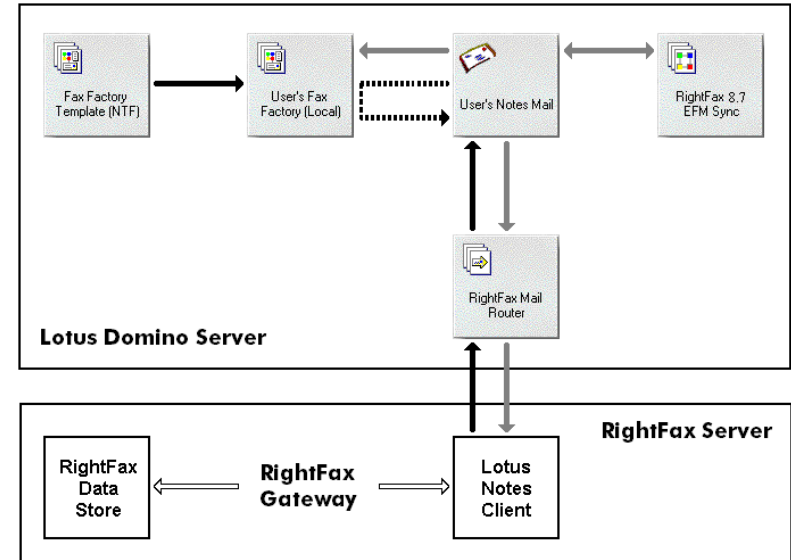
The user composes a fax by activating an agent stored in his mail database. The agent directs composition of the document to the local fax factory database. When saved or sent, the fax is stored in the user's mail database.

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

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

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

Figure 1.1 Fax Data Flow



## Faxing Notes Forms

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

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



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

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

Install an HP LaserJet 4 print driver on the RightFax server.

During the RightFax database installation, you have the option to select rendering the Notes body field only and rendering the entire Notes form. In the database installer, this is selected in the Configure Fax Rendering Options document. You can select both rendering methods. The database installation is described in this chapter.

When you select Notes form rendering in the Configure Fax Rendering Options document, a documentation database is installed that describes the steps to take to configure Notes form rendering. An icon for the RightFax Forms Printing Setup database (Formprnt.nsf) will be added to the Notes workspace. After you install the databases and before you begin configuring the databases, refer to the RightFax Forms Printing Setup database for further instructions.

## Activating the Gateway for Lotus Notes

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

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

## Adding and Configuring the Gateway for Lotus Notes Service

Before you begin, the RightFax e-mail gateway for Lotus Notes requires that your Domino server and client applications all be updated to a version between R5.0.6A and R6.5. Captaris recommends that your Domino server and RightFax server be located on separate computers.

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

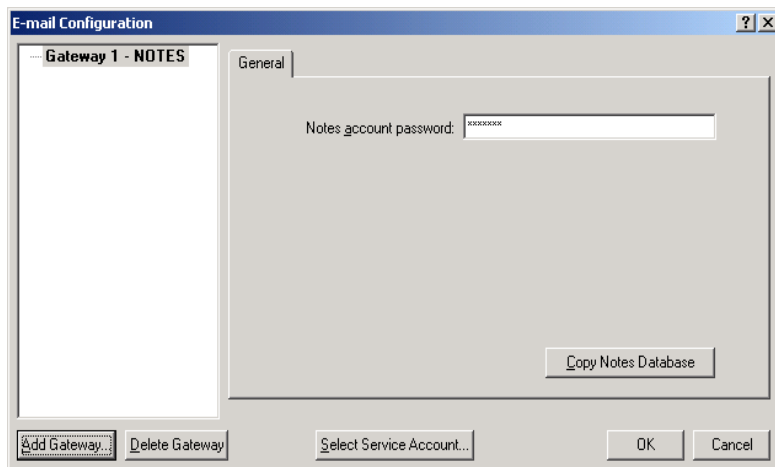
After your RightFax server has had the RightFax Gateway for Lotus Notes functionality enabled, open Windows Control Panel and run the E-mail Gateway configuration program. (If you already have one or more e-mail gateways configured, you can open the E-mail Gateway configuration program by double-clicking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

To add a new gateway, click **Add Gateway**. Select **Lotus Notes** from the list of gateways and then click **Select**. Because RightFax allows you to install multiple e-mail gateways, each installed

gateway is listed in the tree in the left pane. Click each gateway in the list to view its configuration options. Each e-mail gateway you add must be separately configured to work with your Notes server and your network environment.

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

Figure 1.2 The E-mail Configuration Dialog Box



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

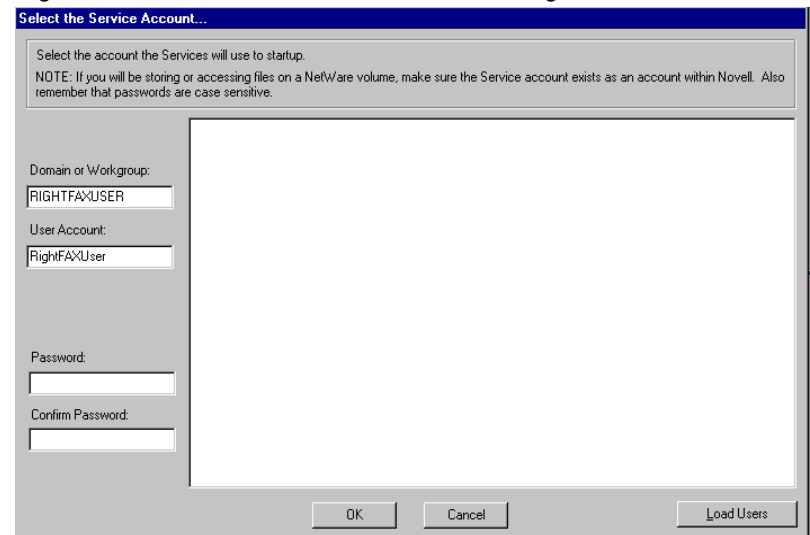
Next, use the installer database to install the RightFax databases in Notes using one of the following options:

- Full integration with Notes Mail (described on [page 10](#))
- Minimal integration with Notes Mail (described on [page 14](#))
- No integration with Notes Mail (described on [page 17](#))
- Extract the database files and install manually (described on [page 20](#))

## Selecting a Service Account for Network Access

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

Figure 1.3 The Select the Service Account Dialog Box



Enter the new service account in the **Domain or Workgroup** and **User Account** boxes. The user account must have administrative rights on the RightFax server. You can also click **Load Users** to browse for a user account on the network. Enter the password for the user account in the **Password** and **Confirm Password** boxes. The password is case-sensitive. Click **OK** to apply the new service account.

## Starting and Stopping the Gateway Service

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



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

## Installing the Databases for Full Notes Mail Integration

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

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

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

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

## Requirements

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

- Designer in the ACL of the mail template to be modified.
- Editor in the ACL of the NAB.
- Ability to create both new and replica databases on the Domino server connecting to the gateway 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 gateway databases.

Each fax user must have:

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

## To install the databases

1. Run the Notes client on the RightFax server and go to the workspace where RightFax is installed. The Notes client that is used to perform the installation must be on a server that is separate from the Domino server.
2. In the Notes client, open the **RightFax 8.7 Gateway DB Installer** (NGInstal.nsf). The **Welcome** document opens. Click **Next**, and the **Stop the RightFax Gateway** document opens.
3. Follow the instructions to stop the e-mail gateway, and then click **Next**.
4. The **Define Installation Type** document opens. Select **New Installation** and **Full Mail Integration**, and click **Next**.
5. Verify the version of Notes and the Domino server and the paths to databases and data directories. Under **Server Information - RightFax**, in the field **Domino server for RightFax components**, you must type the organization and server names. Do not pick from the Notes Address Book dialog box.
6. Click **Next**, and the **Define Database Languages** document opens.
  - With Notes R5 and R6, the RightFax user help, mail template, and EFM Sync database are available in seven languages. You can install one or all languages.
7. Select the language to install, and click **Next**. The **Define Fax Administrative Person or Group** document opens.
8. Specify the person who should have Manager access to the EFM Sync database, and then click **Next**. The **Define Fax Domain** document opens.
9. Specify the foreign domain through which the gateway will route outbound faxes. Click **Next**, and the **Configure Fax Rendering Options** document opens.

10. Select one or both of the following options.

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

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

11. Verify that you have the permissions to continue this procedure, and then click **Next**. The **Define Notes Mail Template to Update** document opens.
12. Specify the Notes mail template to modify with RightFax components, its location, and the version of Notes for the template. Click **Next**, and the **Detach Temporary Files** document opens.

13. Click **Next** to detach all the files to a temporary folder. Alternatively, you can detach the files individually. To do so, select the check box **Display the attached core install files**. The files appear, and you can detach one at a time. To view a list of the files in the language you selected or to detach one of the language files individually, click **View Additional Install Files**.
14. Click **Next**, and the **Create New Server Database Replicas** document opens.
15. Click **Next** to create replicas of the databases on the RightFax server. The **Create Notes Mail Template Backup DB** document opens.
16. Click **Next** to create a backup copy of the Notes mail template that will be modified with RightFax components. The **Copy RightFax Components to Notes Mail Template DB** document opens.
17. Click **Next** to copy the faxing components from the RightFax mail template to the Notes mail template that was specified in an earlier step. The **Add Database Icons or Bookmarks** document opens.
18. Select **Yes** to add icons to the Notes Workspace, and then click **Next**. The **Delete Temporary Files** document opens.
19. Select **Yes** to delete the temporary files and folder that were created in an earlier step. Click **Next** to delete the files, and the **Load Design Task** document opens.
20. Follow the instructions to load the template design. Click **Next**, and the **Migrate Current Data** document opens. Select current data to migrate to this installation. Click **Next** and the **Start the RightFax E-mail Gateway Service** opens. Click **Yes** to start the gateway.

21. Click **Next** and the **Gateway Database Installation Completed** document opens. Click **Next** to close this document.
  - If you selected Notes form rendering in the Configure Fax Rendering Options document, a documentation database is installed that describes the steps to take to configure Notes form rendering. An icon for the RightFax Forms Printing Setup database (Formprnt.nsf) will be added to the Notes workspace. Before you begin configuring the databases, refer to the RightFax Forms Printing Setup database for further instructions.
  - Configure the gateway and RightFax objects by following the instructions in [Chapter 2, "Configuring the EFM Sync Database"](#).

### Files installed by the database installer

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

Table 1b Files Installed by the Installer

Database	File name
RightFax 8.7 Admin Help	Rf850ahlp.nsf
RightFax 8.7 EFM Sync	Rf80sync.nsf
RightFax 8.7 User Help	Rf850uhlp.nsf
RightFax Control Database	Rfcontrl.nsf
RightFax Forms Printing Setup database (if Notes form rendering was <i>not</i> selected)	Formprnt.nsf
RightFax ICD Router	Rf_icd.nsf
RightFax Mail Router	RightFax.nsf
RightFax Mail Router Forms (if Notes form rendering was selected)	Rfaxform.nsf

## Selecting users for fax capability

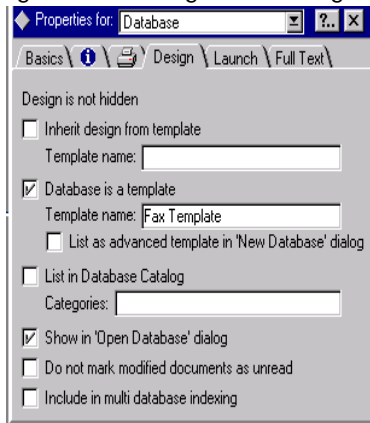
The full Notes Mail integration (page 10) updates all Notes mail users with fax capability. All Notes mail databases that inherit design from the standard Notes mail template will inherit fax capability and RightFax components.

If you want to select users who should receive fax capability, you can create a fax mail template for them *before* installing the e-mail gateway.

### To create a fax mail template

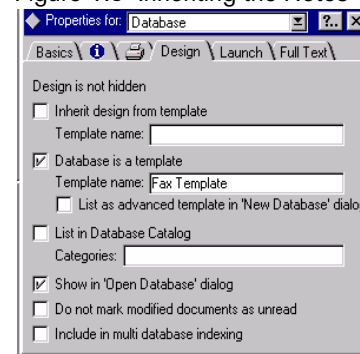
1. On the Domino server, create a *copy* of the standard Notes mail template. This copy is your new fax mail template. Do not create a replica, because modifications made to it will replicate to the original standard Notes template.
2. Add a design template name to the new fax template, as in this example.

Figure 1.4 Adding a New Design Template Name



3. For each Notes mail user who should have fax capability, modify the mail database properties to inherit the design from the new fax template.

Figure 1.5 Inheriting the Notes Template Design



4. Run the RightFax e-mail gateway installation. During the installation, select the fax template rather than the standard Notes mail template.
5. Distribute the new design to all Notes mail users who need fax capability. Use one of the following methods to distribute the design.

### To update the design from the Domino server console window

1. At the command prompt, type "Load 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.
2. Minimize the server console window and return to the Notes client workspace.

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

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

## Installing the Databases for Minimal Notes Mail Integration

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

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

The following configuration process modifies each fax user's mail database by adding an agent, a shared folder, and configuration documents, and it locally installs a fax factory database where fax

mechanics reside. These are installed and updated by an automated setup document that is mailed by the fax administrator to each fax user.

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



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

### Requirements

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

- Editor in the ACL of the NAB.
- Ability to create both new and replica databases on the Domino server connecting to the gateway 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 gateway databases.

Each fax user must have:

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

## To install the databases

1. Run the Notes client on the RightFax server and go to the workspace where RightFax is installed. The Notes client that is used to perform the installation must be on a server that is separate from the Domino server.
2. In the Notes client, open the **RightFax 8.7 Gateway DB Installer** (NGInstal.nsf). The **Welcome** document opens. Click **Next**, and the **Stop the RightFax Gateway** document opens.
3. Follow the instructions to stop the e-mail gateway, and then click **Next**. The **Define Installation Type** document opens.
4. Select **New Installation** and **Minimal Mail Integration**, and click **Next**. The **Define Lotus Configurations** document opens.
5. Verify the version of Notes and the Domino server and the paths to databases and data directories. Click **Next**, and the **Define Database Languages** document opens.
  - With Notes R5 and R6, the RightFax user help, mail template, and EFM Sync database are available in seven languages. You can install one or all languages.
6. Select the language to install, and click **Next**. The **Define Fax Administrative Person or Group** document opens.
7. Specify the person or group of users who should have Manager access to the EFM Sync database, and then click **Next**. The **Define Fax Domain** document opens.
8. Specify the foreign domain through which the gateway will route outbound faxes. Click **Next**, and the **Configure Fax Rendering Options** document opens.

9. Select one or both of the following options.

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

Click **Next**, and the **Define Fax Factory Template Version** document opens.

10. Specify the version of Notes that is installed on the fax client computers. Click **Next**, and the **Validate Access to the NAB or Domino Directory** document opens.
11. Verify that you have the permissions to continue this procedure, and then click **Next**. The **Define Notes Mail Template to Update** document opens.
12. Specify the Notes mail template to modify with RightFax components, its location, and the version of Notes for the template. Click **Next**, and the **Detach Temporary Files** document opens.

13. Click **Next** to detach all the files to a temporary folder.  
Alternatively, you can detach the files individually. To do so, select the check box **Display the attached core install files**. The files appear, and you can detach one at a time. To view a list of the files in the language you selected or to detach one of the language files individually, click **View Additional Install Files**.
14. Click **Next**, and the **Create New Server Database Replicas** document opens.
15. Click **Next** to create replicas of the databases on the RightFax server. The **Create Notes Mail Template Backup DB** document opens.
16. Click **Next** to create a backup copy of the Notes mail template that will be modified with RightFax components. The **Copy RightFax Components to Notes Mail Template DB** document opens.
17. Click **Next** to copy the faxing components from the RightFax mail template to the Notes mail template that was specified in an earlier step. The **Add Database Icons or Bookmarks** document opens.
18. Select **Yes** to add icons to the Notes Workspace, and then click **Next**. The **Delete Temporary Files** document opens.
19. Select **Yes** to delete the temporary files and folder that were created in an earlier step. Click **Next** to delete the files, and the **Load Design Task** document opens.
20. Follow the instructions to load the template design. Click **Next**, and the **Migrate Current Data** document opens. Select current data to migrate to this installation. Click **Next** and the **Start the RightFax E-mail Gateway Service** opens. Click **Yes** to start the gateway.

21. The gateway will now be running.

- If you selected Notes form rendering in the **Configure Fax Rendering Options** document, a documentation database is installed that describes the steps to take to configure Notes form rendering. An icon for the RightFax Forms Printing Setup database (Formprnt.nsf) will be added to the Notes workspace. Before you begin configuring the databases, refer to the RightFax Forms Printing Setup database for further instructions.
- Configure the gateway and RightFax objects by following the instructions in [Chapter 2, "Configuring the EFM Sync Database"](#).

### Files installed by the database installer

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

Table 1c Files Installed by the Installer

Database	File name
RightFax 8.7 Admin Help	Rf850ahlp.nsf
RightFax 8.7 EFM Sync	Rf80sync.nsf
RightFax 8.7 User Help	Rf850uhlp.nsf
RightFax Control Database	Rfcontrl.nsf
RightFax Fax Factory	Rfactory.ntf
RightFax Forms Printing Setup database (if Notes form rendering was <i>not</i> selected)	Formprnt.nsf
RightFax ICD Router	Rf_icd.nsf
RightFax Mail Router	RightFax.nsf
RightFax Mail Router Forms (if Notes form rendering was selected)	Rfaxform.nsf

## Installing the Databases for No Notes Mail Integration

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

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

### Requirements

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

- Editor in the ACL of the NAB.
- Ability to create both new and replica databases on the Domino server connecting to the gateway 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 gateway databases.

Each fax user must have:

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

### To install the databases

1. Run the Notes client on the RightFax server and go to the workspace where RightFax is installed. The Notes client that is used to perform the installation must be on a server that is separate from the Domino server.
2. In the Notes client, open the **RightFax 8.7 Gateway DB Installer** (NGInstal.nsf). The **Welcome** document opens. Click **Next**, and the **Stop the RightFax Gateway** document opens.
3. Follow the instructions to stop the e-mail gateway, and then click **Next**. The **Define Installation Type** document opens.
4. Select **New Installation** and **No Mail Integration**, and click **Next**. The **Define Lotus Configurations** document opens.
5. Verify the version of Notes and the Domino server and the paths to databases and data directories. Click **Next**, and the **Define Database Languages** document opens.
  - With Notes R5, the RightFax user help, mail template, and EFM Sync database are available in seven languages. You can install one or all languages.
6. Select the language to install, and click **Next**. The **Define Fax Administrative Person or Group** document opens.
7. Specify the person who should have Manager access to the EFM Sync database, and then click **Next**. Click **Next**, and the **Define Fax Domain** document opens.
8. Specify the foreign domain through which the gateway will route outbound faxes. Click **Next**, and the **Configure Fax Rendering Options** document opens.

9. Select one or both of the following options.

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

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

10. Verify that you have the permissions to continue this procedure, and then click **Next**. The **Define Notes Mail Template to Update** document opens.
11. Specify the Notes mail template to modify with RightFax components, its location, and the version of Notes for the template. Click **Next**, and the **Detach Temporary Files** document opens.

12. Click **Next** to detach all the files to a temporary folder. Alternatively, you can detach the files individually. To do so, select the check box **Display the attached core install files**. The files appear, and you can detach one at a time. To view a list of the files in the language you selected or to detach one of the language files individually, click **View Additional Install Files**.
13. Click **Next**, and the **Create New Server Database Replicas** document opens.
14. Click **Next** to create replicas of the databases on the RightFax server. The **Create Notes Mail Template Backup DB** document opens.
15. Click **Next** to create a backup copy of the Notes mail template that will be modified with RightFax components. The **Copy RightFax Components to Notes Mail Template DB** document opens.
16. Click **Next** to copy the faxing components from the RightFax mail template to the Notes mail template that was specified in an earlier step. The **Add Database Icons or Bookmarks** document opens.
17. Select **Yes** to add icons to the Notes Workspace, and then click **Next**. The **Delete Temporary Files** document opens.
18. Select **Yes** to delete the temporary files and folder that were created in an earlier step. Click **Next** to delete the files, and the **Load Design Task** document opens.

19. Follow the instructions to load the template design. Click **Next**, and the **Migrate Current Data** document opens. Select current data to migrate to this installation. Click **Next** and the **Start the RightFax E-mail Gateway Service** opens. Click **Yes** to start the gateway.

- If you selected Notes form rendering in the **Configure Fax Rendering Options** document, a documentation database is installed that describes the steps to take to configure Notes form rendering. An icon for the RightFax Forms Printing Setup database (Formprnt.nsf) will be added to the Notes workspace. Before you begin configuring the databases, refer to the RightFax Forms Printing Setup database for further instructions.
- Configure the gateway and RightFax objects by following the instructions in [Chapter 2, “Configuring the EFM Sync Database”](#).

### Files installed by the database installer

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

Table 1d Files Installed by the Installer

Database	File name
RightFax 8.7Admin Help	Rf850ahlp.nsf
RightFax 8.7a EFM Sync	Rf80sync.nsf
RightFax 8.7 User Help	Rf850uhlp.nsf
RightFax Control Database	Rfcontrl.nsf
RightFax Forms Printing Setup database (if Notes form rendering was <i>not</i> selected)	Formprnt.nsf
RightFax ICD Router	Rf_icd.nsf

Table 1d Files Installed by the Installer (Continued)

Database	File name
RightFax Mail Router	RightFax.nsf
RightFax Mail Router Forms (if Notes form rendering was selected)	Rfaxform.nsf

## Extracting the Install Databases to Prepare for Manual Installation

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

For instructions, refer to the RightFax customer support Web site at <http://www.rightfax.com/support/>.

## Handling Undeliverable Faxes

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

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

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

### To configure the “Handle Undeliverable Faxes” agent

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

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

5. Save and close the agent. This will re-sign the agent with your signature so that it will run within your organization.
6. In the **Agents** view, select the check box to the left of the **Handle Undeliverable Faxes** agent to enable it.

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

### Uninstalling the Gateway

**To uninstall the RightFax gateway and databases, complete the following steps:**

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

■ ■ ■

## Chapter 2

# Configuring the EFM Sync Database

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

EFM Sync contains the following information:

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

The interprocess communication document (ICD) is a small document that is generated when any of the 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, ICD processing allows immediate, on demand database synchronization.

After you have installed the RightFax database files (described in [Chapter 1, “Installing the Gateway for Lotus Notes”](#)), 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 22](#)).
2. Configure the RightFax server document in Notes, establishing database synchronization between the RightFax and the Domino servers (described on [page 22](#)).
3. Configure the RightFax gateway document in Notes (described on [page 25](#)).
4. Configure RightFax objects in Notes, such as cover sheets and billing codes (described on [page 31](#)).
5. Configure default user settings and import users from the Notes address book (described on [page 31](#)).
6. If needed, configure users to receive e-mail notifications of received faxes via Notes (described on [page 35](#)).

## Understanding EFM Sync Database Security

During the initial gateway 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 gateway installation (described in [Chapter 1, “Installing the Gateway for Lotus Notes”](#)), 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 34](#).

## Configuring the RightFax Server

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

### Understanding database synchronization

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

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



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

The EFM Sync database can be configured for full or selective replication. Full replication maintains a mirrored replica of the database across two or more servers. Selective replication is most often used to maintain a local replica of the database, such as on a laptop. The EFM Sync database is installed with full database replication, and you can enable selective replication. To enable selective replication, see [“Managing database replication”](#) on [page 25](#).

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 e-mail gateway for Lotus Notes, all database synchronization is disabled. Only Notes users with Manager access to the EFM Sync database can enable or disable synchronization.

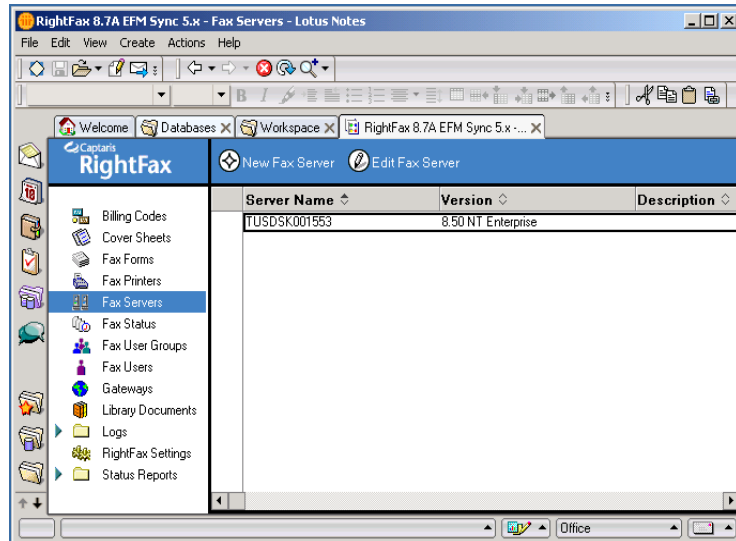
RightFax recommends that you enable synchronization after you:

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

### To configure the server document

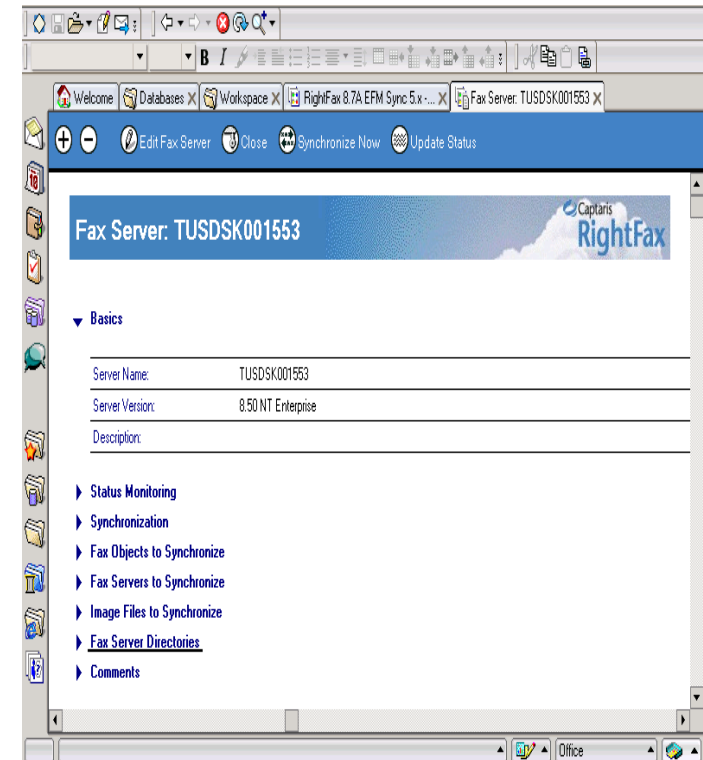
1. In Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view. Open the **Fax Servers** view. A list of your RightFax servers appears in the view.

Figure 2.1 The EFM Sync Fax Servers List



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

Figure 2.2 The Fax Server Document



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

Table 2a Fax Server Information

Field	Setting
<b>Synchronization</b>	Select the check box to enable synchronization.
<b>Synchronization Interval</b>	Enter the frequency you want synchronization between the Domino and RightFax servers to occur. A setting of eight hours is recommended.

Table 2a Fax Server Information (Continued)

Field	Setting
<b>Synchronization Logging</b>	<p>Specify the level of information that will be written to the Synchronization Log:</p> <p><b>None.</b> Records the date and time of the synchronization and the result.</p> <p><b>Terse</b> (recommended). Records the success or failure of the synchronization process.</p> <p><b>Normal.</b> Records details that make it useful to the average RightFax user.</p> <p><b>Verbose.</b> Records details that make it useful to the RightFax administrator.</p> <p><b>Debug.</b> 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 <a href="#">“RightFax Event Logs” on page 45</a>.</p>
<b>Synchronization Prescan Agent</b>	The name of any Lotus Notes agent that should run prior to the synchronization.
<b>Synchronization Postscan Agent</b>	<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 2a Fax Server Information (Continued)

Field	Setting
<b>Status Monitoring</b>	Select the check box to enable writing fax server status documents in the EFM Sync database.
<b>Status Interval</b>	<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.
- 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 cover sheet and library document image files *in addition* to the object IDs. This will copy the cover sheet or library document files from the RightFax server to the Domino server during synchronization. If you select either of these options, you must also specify a folder on the Domino server in which to store the files.
- Under **Fax Server Directories**, paths and data folders on the RightFax server appear.
- Under **Comments**, enter any comments you may need as documentation.
- Click **Save and Close** to save your synchronization settings and return to the EFM Sync database.

## Managing database replication

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

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

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

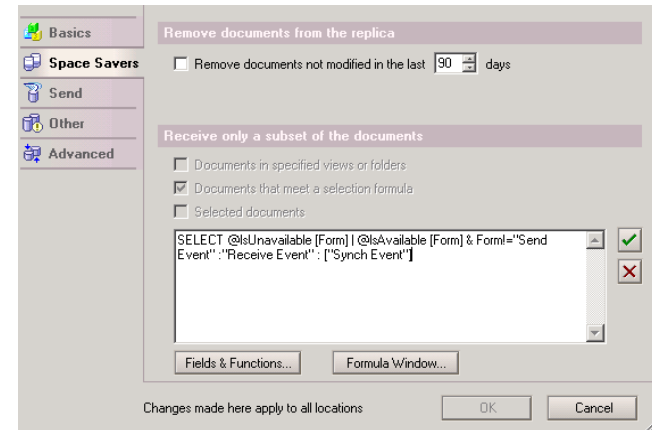
### To enable selective database replication

1. In Notes, right-click the **EFM Sync** icon to open a shortcut menu.
2. In Notes 4.x, select **Replication Settings**. In Notes 5.x, select **Replication**, and then **Settings**. The **Replication Settings** dialog box opens with the **Space Savers** settings in view. In Notes 6.x, select **Replication** from the **File** menu, then **New Replica**. The **Create Replica** dialog box opens.
3. In Notes 4.x and 5.x, select the check box **Replicate a subset of documents**. Select the check box **Select by formula**. In Notes 6.x, click **More Settings**, then select **Space Saver**, and select the check box for **Documents that meet a selection formula**.

4. In the formula window create the following formula:

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

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



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

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

## Configuring the RightFax Gateway Document

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

ICD processing allows immediate, on-demand database synchronization.

## Understanding ICD processing

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

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

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

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

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

In this example there is a potential lag of up to 45 seconds between the time when the Process Outbound action is invoked and the time when the ICD is read and outbound faxes are processed. For this reason, it is recommended that you configure ICD processing with a brief interval. Since ICDs are routed to a different database from regular fax traffic, the ICD processing task can require almost no time to complete when the ICD router is empty, so you can configure ICD processing for a shorter interval than you might for other intensive fax processes. Even a setting of 15 seconds will not tax regular fax processes because for the majority of time the ICD router database will be empty.

## Faxing Notes forms

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

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

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

### To configure the gateway document

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

Table 2b Settings for ICD Processing

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

Table 2b Settings for ICD Processing (Continued)

Field	Setting
<b>Notes Mail Server</b>	Select the Notes mail server where ICD documents are routed.
<b>Router Database</b>	Select the file name where the ICD router database is located (usually in the Notes Mail database.)

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

Table 2c Settings for Inbound Faxes

Field	Setting
<b>Enabled</b>	Select the check box to receive inbound faxes.
<b>Interval</b>	Enter the interval at which the gateway should check the RightFax server for inbound faxes.
<b>Logging</b>	<p>Specify the level of information that will be written to the Fax Receive Log.</p> <ul style="list-style-type: none"> <li>• <b>None.</b> Records the date and time the fax was received and the result.</li> <li>• <b>Terse.</b> (recommended). Records the success or failure of the received fax.</li> <li>• <b>Normal.</b> Records details that make it useful to the average RightFax user.</li> <li>• <b>Verbose.</b> Records details that make it useful to the RightFax administrator.</li> <li>• <b>Debug.</b> 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.</li> </ul> <p>For a description of the log, see <a href="#">“RightFax Event Logs” on page 45.</a></p>

Table 2c Settings for Inbound Faxes (Continued)

Field	Setting
<b>Notes Mail Server</b>	Select the Notes mail server where faxes should be sent.
<b>Router Database</b>	The name of Notes mail router database where the gateway sends faxes.
<b>Prescan Agent</b>	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.
<b>Postscan Agent</b>	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.
<b>New Fax Subject Line</b>	<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.</p> <p>The default is "A new &lt;FAX_NUMPAGES&gt; page fax has arrived from &lt;FAX_CSID&gt;".</p> <p>FAX_NUMPAGES = The number of pages received. FAX_CSID = The sender's caller subscriber ID (CSID).</p>
<b>New Fax From Line</b>	<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.</p> <p>The default is "Fax Server &lt;FAXSERVERNAME&gt;".</p> <p>FAXSERVERNAME = The name of the fax server.</p>
<b>Include Original Subject in Completed Fax Notification</b>	The notification to the sender will include the subject line of the sent fax.

Table 2c Settings for Inbound Faxes (Continued)

Field	Setting
<b>Source for Fax Header Image</b>	<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>
<b>Process Fax Body</b>	<p>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:</p> <ul style="list-style-type: none"> <li>• To attach fax images, select <b>Attach Fax Images</b>.</li> <li>• To embed the image in the message so that it can be viewed within the message without opening it, select <b>Embed Fax Images</b>.</li> <li>• To embed and attach fax images, select <b>Embed and Attach Fax Images</b>.</li> </ul>
<b>Fax Images to Embed</b>	<ul style="list-style-type: none"> <li>• To embed the first page of the image in the mail message, such as the cover page, select <b>First Page</b>.</li> <li>• To embed all the fax page images in the mail message, select <b>All Pages</b>.</li> </ul>
<b>Size of Embedded Fax Images</b>	Select the proportionate size for fax images that will be embedded in Notes mail messages rather than attached.
<b>Attach History</b>	To attach a text file that contains the transmission history to each received fax, select <b>Yes</b> .

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

Table 2d Settings for Outbound Faxes

Field	Setting
<b>Enabled</b>	Select the check box to send outbound faxes.
<b>Interval</b>	Enter the frequency you want the gateway to check the Notes mail server for outbound faxes. The recommended setting is 60 seconds.
<b>Logging</b>	<p>Specify the level of information that will be written to the Fax Send Log.</p> <ul style="list-style-type: none"> <li>• <b>None.</b> Records the date and time the fax was sent and the result.</li> <li>• <b>Terse.</b> (recommended). Records the success or failure of the sent fax.</li> <li>• <b>Normal.</b> Records details that make it useful to the average RightFax user.</li> <li>• <b>Verbose.</b> Records details that make it useful to the RightFax administrator.</li> <li>• <b>Debug.</b> 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.</li> </ul> <p>For a description of the log, see <a href="#">“RightFax Event Logs”</a> on page 45.</p>
<b>Notes Mail Server</b>	Select the Notes mail server where the gateway mail router database resides.

Table 2d Settings for Outbound Faxes (Continued)

Field	Setting
<b>Router Database</b>	The name of the Lotus Notes mail router database where the named gateway sends faxes.
<b>Prescan Agent</b>	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.
<b>Postscan Agent</b>	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.
<b>Export Method</b>	<p>If faxes will consist of the contents of the Notes body field only, select <b>Microsoft Word RTF</b> 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"> <li>• <b>Notes Native Export.</b> 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.</li> <li>• <b>Notes Client Print Processing.</b> 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.</li> </ul>
<b>Export Page Size</b>	Determines the page size for the fax. This option is not available for Notes Client Print Processing.
<b>Notes Client Print Timeout</b>	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.

Table 2d Settings for Outbound Faxes (Continued)


Field	Setting
<b>Notes Client Print Throttle</b>	Select the interval to run the Notes Client Print Process.
<b>Notes Client Print Cleanup</b>	<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> <b>Important</b> Notes will stop processing printed fax forms when it is closed. Thus, in almost all circumstances, especially with high volume, set this option to <b>Never</b>.</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>
<b>Unknown Originator</b>	<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"> <li>• <b>Do not send.</b> Abandons the fax and sends a failure message to the sender.</li> <li>• <b>Send using default user.</b> Retrieves settings and data from the default user document in the EFM Sync database.</li> <li>• <b>Create user record.</b> 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.</li> </ul>

Table 2d Settings for Outbound Faxes (Continued)

Field	Setting
<b>Delete Sent Faxes from Router</b>	Select the check box to have the gateway delete the fax document from the mail router database after the fax is successfully sent.
<b>Force Notification to Always</b>	Select the check box to override the sender's notification setting in the User Options document, thus always sending a notification for faxes sent through this gateway.

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

Table 2e Settings for Real-Time Fax Status

Field	Setting
<b>Real-Time Fax Status</b>	Select the check box to activate real-time fax status reporting.
<b>Append Cover Page to Log</b>	<p>Select <b>Yes</b> 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 <b>If Needed</b> to append cover pages for:</p> <ul style="list-style-type: none"> <li>• Faxes held for preview.</li> <li>• Faxes that require approval.</li> </ul>

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

Field	Setting
<b>Append Body Images to Log</b>	Select <b>Yes</b> to include body pages of sent faxes in the real-time fax status report. This will increase the size of the report and the EFM Sync database.  Select <b>If Needed</b> to append cover pages for: <ul style="list-style-type: none"> <li>• Faxes held for preview.</li> <li>• Faxes that require approval.</li> </ul>
<b>Append History to Log</b>	Select <b>Yes</b> 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.
<b>Delete Completed Faxes</b>	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"> <li>• Select <b>None</b> to never delete faxes from the report.</li> <li>• Select <b>Successful Only</b> to delete only faxes that are successfully sent.</li> <li>• Select <b>All</b> to delete all faxes from the report.</li> </ul>

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

## Configuring RightFax Objects in Notes

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

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

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

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

## Adding and Configuring Users

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

1. Configure the connections document (described on [page 32](#))
2. Configure default user settings (described on [page 32](#))
3. Import users from the Notes Address Book (described on [page 33](#))
4. Create routing codes (described on [page 34](#))
5. Set up fax administrators (described on [page 34](#))
6. If installing RightFax for full Notes Mail integration, run the Load Design task (described on [page 35](#))

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

## Configuring the connections document

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

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

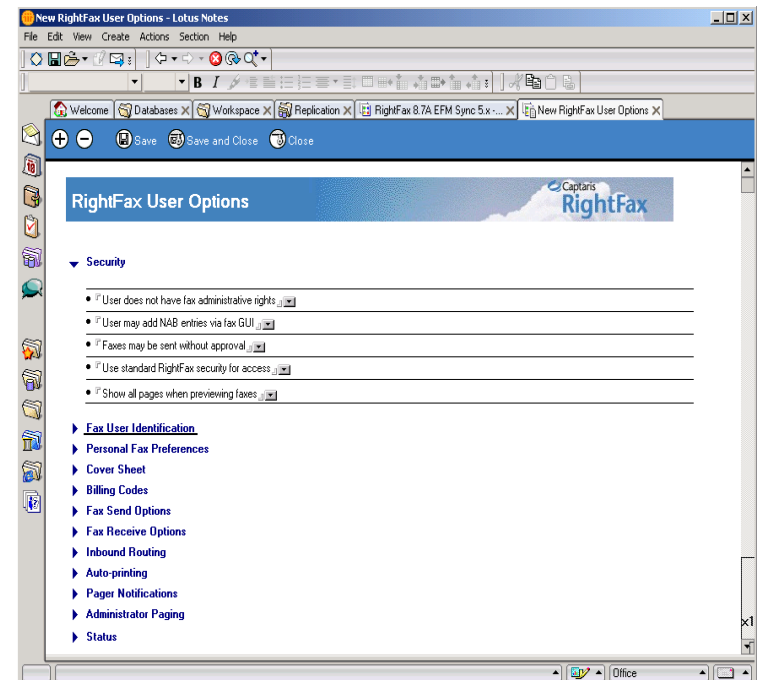
The **Mail Connections Document** button is for later use in the following circumstances:

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

## Configuring default user settings

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

Figure 2.4 RightFax Default User Settings



## Importing users from the Notes Address Book

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

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

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

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

Figure 2.5 Import Users from the Notes Address Book

**Populate from NAB:**  
Company Address Book

**Populate for User(s):**  
 Allow me to select user(s) from NAB  
 Populate for all users in NAB

**Other Options:**  
 Do not overwrite existing entries  
 Prompt for overwrite of existing entries  
 Automatically overwrite existing entries  
 Run silent (don't display prompts)  
 Confirm that database was populated

OK  
Cancel

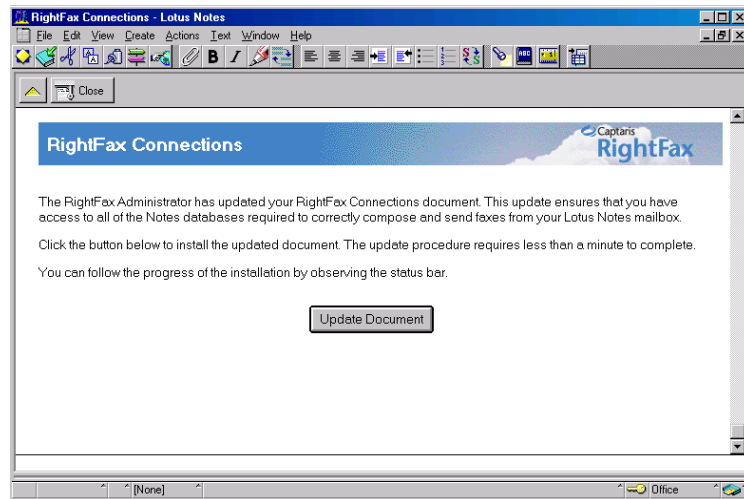
3. Select the address book to import from. From the selected address book, you have the option to select all users or pick the users you want to import.

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

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

- Click **OK** to import the users. When users are imported from the Notes Address Book, RightFax mails the Connections document to those users. Users receive the Connections document in their Inboxes. Depending on the settings in the Connections document (described on [page 32](#)), users must open the document, and click **Update Document**. This installs the fax factory database in their mail databases.

Figure 2.6 RightFax Connections Document

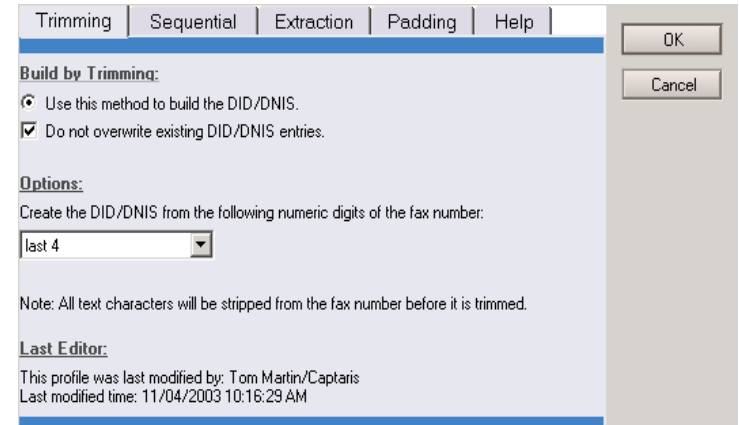


## Creating routing codes

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

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

Figure 2.7 Build DID/DNIS Dialog Box



- To choose a method for building routing codes, refer to the **RightFax 8.7 Admin Help** database.

## Creating RightFax administrators

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

During the gateway installation (described in [Chapter 1, "Installing the Gateway for Lotus Notes"](#)), 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. You can assign these rights in the RightFax administration utility,

Enterprise Fax Manager, or in EFM Sync. If you are synchronizing RightFax to Notes, you should create administrators in Enterprise Fax Manager.

### To create RightFax administrators in Notes

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

### Refreshing users' Notes mail template

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

### To update the design

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

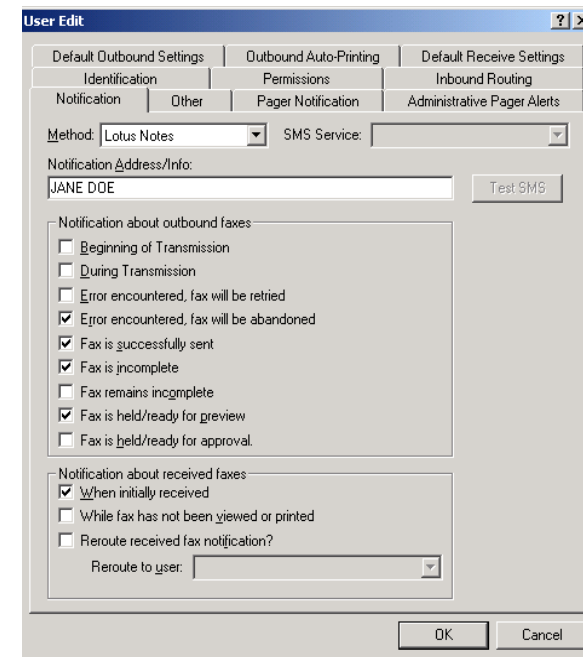
## Configuring Users for E-mail Notification of Received Faxes

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

### To configure a user to receive fax notifications in Notes

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

Figure 2.8 The User Edit Notification Tab in RightFax



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

## Group notification

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

■ ■ ■

## Chapter 3

# Using Notes to Send and Receive Faxes

Sending a Notes mail message to a fax number is similar to sending mail, except that the message is specially addressed. RightFax embedded codes provide flexibility when sending mail messages as faxes.

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



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

You have the option to preview a fax before sending it, and you can forward a fax that was sent to you.

This chapter includes instructions for working with the RightFax User Options document. The User Options document provides default settings for sending and receiving faxes.

## Sending a Fax

Sending a Notes mail message to a fax number is similar to sending mail, except that the message is specially addressed.

Text entered in the **Subject** box in the Notes mail message will appear in the “Notes” section of the fax cover sheet. Text entered in the body of the mail message will appear as the body of the fax. Attached files will be converted to fax images and appended to the

fax. Formats that RightFax converts are described in [Appendix B, “File Formats that Convert to Fax Format”](#). Unsupported file attachments cannot be converted and will be ignored.

You have the following options for sending a fax:

- Send a fax using the Notes mail message form.
- Send a fax using the RightFax advanced fax form. The advanced fax form contains RightFax functionality, which your RightFax administrator may have added to your Notes mail database.

RightFax embedded codes are special faxing instructions that you can add to mail messages that will be converted to faxes. You can use embedded codes to include fax cover sheet information, attach library documents, add billing information, and more. For information, see [“Using RightFax Embedded Codes in Mail Messages”](#) on [page 42](#).

### To send a fax using the Notes mail message form

Open a new mail message form in your mail database, and then address the fax using the following format:

*Name@FaxNumber@FaxDomain*

*Name* is the recipient name, *FaxNumber* is the fax number, and *FaxDomain* is the domain established on your system for sending faxes.

For example, to address a fax to John Smith at fax number 555-6732 and have the fax delivered to the RFX foreign domain, type the following address:

John Smith@555-6732@RFX

### To send a fax using the advanced fax form

1. Open your Notes mail database and display your Inbox.
2. Select **RightFax Faxing** from the Shortcut List, then click **New RightFax** in the Action bar, or on the **Actions** menu click **Fax Tools**, and then click **New RightFax Fax**. This opens a new mail message and displays the **Fax Information** dialog box (described on [page 38](#)).
3. Add one or more fax recipients and specify your cover sheet options, library document attachments, and other sending preferences. Click **OK**.

To send the mail message to e-mail addresses in addition to fax addresses, click **E-mail** in the Action bar. The Notes **Mail Address** dialog box opens, and you can select one or more e-mail addresses.

4. Complete the **Subject** line and type the body of the mail message. File attachments will be converted to fax format and added to the end of the fax in the order they are listed.
5. Click **Send** when you are ready to send the mail message.

## Using the Fax Information Dialog Box

When you create a new fax from your mail database by selecting **New RightFax Fax**, Notes opens the **Fax Information** dialog box. Use this dialog box to select one or more fax addresses from your address books or type the address information. You can also specify cover sheet options, add library document attachments, and customize several other sending preferences.

## The Send To tab

Figure 3.1 The Send To Tab



**Note** When you select an address from the Notes personal address book, that address must have an Office Fax entry in order to send. Even if the Home Fax box is completed, if there is no Office Fax setting, the fax will not send.

**Fax List** This group of options lets you select one or more fax addresses. You can send faxes to addresses selected from one of the following address books:

- Notes personal address book
- Notes public address book or Domino folder

Select an address book in the **Active Phonebook** list and a fax domain in the **Domain** list. (Up to five address books can be used.) Click the **Name Selection** button (with the person icon) next to the **To:** or **cc:** box. This lists all addresses (both group and individual) in the selected phonebook. Select the addresses you want and click **OK** to enter them in the specified box.

To delete all addresses in a list, click **Delete** (the red X button). To delete all addresses from both lists, click **Clear All**.

**New Entry** If you are sending a fax message to a fax address that is not already listed in one of your address books, you can type the fax addressing information in the boxes under **New Entry**.

Click **Add to Fax List Only** to use the address you enter with the current fax. Click **Add to Fax List and Phonebook (Address Book)** to use the address you enter with the current fax *and* add it to the phonebook specified in the **Active Phonebook** list.

Enter the name, company name, fax number(s), and voice number(s) of the addressee, and then click **To:** or **cc:** to add the address to the list of recipients.

## The Cover Sheet tab

Figure 3.2 The Cover Sheet Tab

The screenshot shows the 'Cover Sheet' tab of a software interface. It is divided into two main sections: 'Cover Sheet' and 'From Info'.  
**Cover Sheet:**  
- 'Select a cover sheet': A dropdown menu with 'FCSGCC.PCL' selected.  
- 'Resolution': A dropdown menu with 'Normal' selected.  
- 'Cover Sheet Text': A large text area containing the instruction 'The text will appear in the Subject line of the Notes fax form.'  
**From Info:**  
- 'Name': 'DJA'  
- 'Company': 'Captaris'  
- 'Voice': '555-7629'  
- 'Fax': '555-0144'  
- 'General Fax': '425-555-1212'  
An 'edit' button is located next to the 'Company' field. 'OK' and 'Cancel' buttons are at the bottom right.

**Cover Sheet** These options let you select and customize a cover sheet. Specify whether or not to include a cover sheet, the resolution for the cover sheet, and the cover sheet file to use. Some or all of the cover sheet options may be unavailable, depending on your RightFax user settings.

**From** These boxes let you specify return address information on the fax cover sheet. If the fax is sent without a cover sheet, these settings will not be included in the fax.

**Cover Sheet Text** This text will appear on the fax cover sheet.

## The Options tab

Figure 3.3 The Options Tab

The screenshot shows the 'Options' tab of a software interface. It is divided into several sections:  
**Options:**  
- 'Use SmartResume?': 'Yes'  
- 'Auto-delete after send?': 'On Success'  
- 'Fax Priority': 'Normal'  
- 'Hold for preview?': 'Yes'  
- 'Notification': 'On Failure'  
- 'Deliver only to CSID': (empty field)  
- 'Retry count': '3 times'  
- 'Retry interval': '5 minutes later'  
**Delay Send:**  
- 'Send date': '11/04/2003'  
- 'Send time': '01:07 PM'  
**Bill Codes:**  
- 'Bill code': '288' and '1717'  
- 'Description': 'Captaris Bill Code'  
**Overlay Form:**  
- 'COPY -- -- Copy back ground'  
**Library Docs:**  
- 'BACKGROUND -- Captaris Corporate Backgrounder'  
Buttons for 'edit', 'clear', 'add', and 'clear' are present next to various fields. 'OK' and 'Cancel' buttons are at the bottom right.

**Use Smart-Resume** Tells the fax server to intelligently re-send only the portion of a fax that failed to send. For example, if the connection is broken after 40 pages of a 50-page fax, normally all 50 pages have to be re-sent. By enabling Smart-Resume, the fax server will re-send only the last ten pages.

**Auto-Delete After Send** Specifies when to delete sent faxes from your RightFax mailbox.

**Fax Priority** Sets the priority at which the faxes are responded to by the fax server. High priority will only be an option if you have been granted the high priority permission in RightFax.

**Hold for Preview** Sends the fax to your mailbox first so that you can review it and then send it. This option lets you check the appearance of the fax before it is sent.

**Notification** You can receive a notification if the fax is successfully or unsuccessfully sent. Select **On Failure** to receive a notice that the fax failed. Select **Always** to receive a notice of success or failure. Select **Never** if you don't want to receive a notice.

**Deliver Only to CSID** You can specify that the fax only be delivered to a fax machine with a specific CSID (a special ID that is exchanged between sending and receiving fax machines.) This can help prevent sensitive faxes from being accidentally sent to the wrong fax number. Enter the exact CSID of the destination fax machine in this box. This entry is case-sensitive. If this box is blank, the fax will be transmitted to *any* receiving fax machine regardless of its CSID.

**Retry Count** The number of times to retry sending the fax if a connection can't be made or is dropped.

**Retry Interval** The number of minutes between retry attempts.

**Overlay Form** Select an overlay form (if any) to add to the fax.

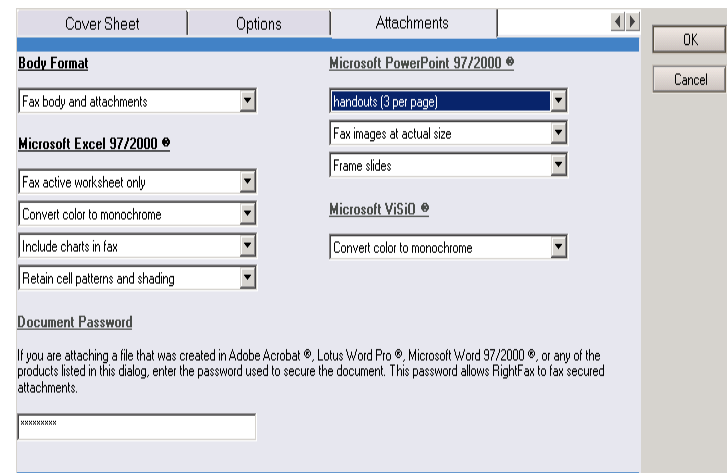
**Library Documents** Select any library documents to include with the fax. Library documents are added to the end of the fax in the order they are added to this list.

**Delay Send** If you do not want your fax to send immediately, these settings let you specify a future date and time to send the fax.

**Billing Code** Specify up to two billing codes to associate with the fax.

## The Attachments tab

Figure 3.4 The Attachments Tab



The options on this tab apply only to attachments to fax-bound Notes mail messages that are converted to fax format using server-side application conversion on the RightFax server (described in the *RightFax Administrator's Guide*).

**Body Format** When you send a fax with attached documents, the following image files are generated:

- Cover page (if any).
- Fax body page that includes icons that represent the attachments (as shown in the Notes mail message when you prepare it).
- The attached documents.

**Fax body and attachments** sends the cover page, fax body page, and attachments.

**Fax file attachments only** sends the cover page and attached documents. This option does not send the fax body page containing the icons that represent the attachments.

The options under **Microsoft Excel**, **Microsoft PowerPoint**, and **Visio** allow you to optimize how these types of file attachments will be converted. 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.

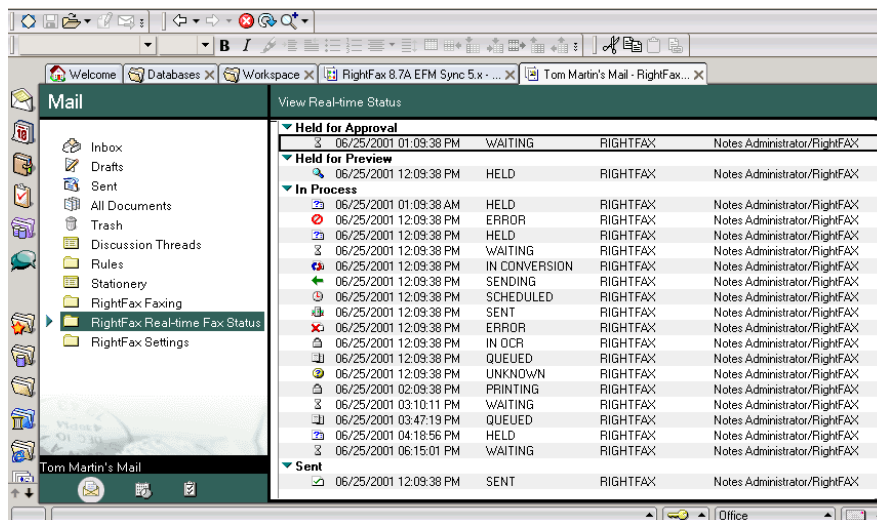
## Previewing Faxes

You have the option to preview a fax before sending it. This option lets you check the appearance of the fax before it is sent. You also can view the status of your faxes on the RightFax server.

### To preview the fax

1. Open your mail database and display your Inbox.
2. Open the **RightFax Real-Time Fax Status** view.

Figure 3.5 Previewing Faxes



## Forwarding Faxes

E-mail messages and faxes can be forwarded automatically from your mail database to another user's mail database. The feature complements the Notes out-of-office agent, which delivers an away message to the originator of a message. It is available only if your system is installed with the full Notes Mail integration with RightFax.

You can choose recipients, choose to forward e-mail messages and/or faxes, and choose whether or not to save forwarded messages.

### To configure forwarding

1. Open your Notes mail database to any view.
2. From the **ACTIONS** menu, select **Mail Tools**, and then select **Autoforward Settings**. The **Autoforward Settings** dialog box opens.
3. A message will appear warning you that the autoforward agent will not run if you do not have sufficient security access. To disable future displays of this warning, select the appropriate check box.
4. Configure the forwarding options by referring to the online help in the Notes database.

## Receiving Notice that a Fax is Undeliverable

RightFax faxes and Notes mail messages sent to fax destinations will be returned to the sender if delivery is unsuccessful. The fax will be returned in the form of a report titled "Fax Delivery Failure." From within the report, the fax can be re-addressed and sent again.

### To add new entries to the RightFax phonebooks

1. From the Notes Workspace, double-click the **EFM Sync** icon.
2. Select **Phonebook Entry** from the **Create** menu. This opens the **New Phonebook Entry** dialog box.

## Using RightFax Embedded Codes in Mail Messages

Embedded codes are special faxing instructions that you insert directly into fax-bound documents. You can use embedded codes to include fax cover sheet information, attach library documents, add billing information, and more.

To add an embedded code to a mail message, type the code you want, along with any required parameters, between angle brackets. For example, an embedded code that tells RightFax to send a library document called "PriceSheet" is written as:

```
<LIBDOC:PRICESHEET>
```

RightFax removes all embedded codes from the mail message during conversion so that 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 typed in upper case or lower case.

Embedded codes *must always* use a native printer font. This is because when the mail message converts 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. And it is this text in the PCL file that is replaced. If you do not use native printer fonts for your embedded codes, the codes themselves will appear

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



**Note** *Windows 2000 may add unexpected spacing or other characters to embedded code strings even when using a native printer font. For embedded codes in e-mail messages created on Windows 2000 computers, RightFax recommends using the Courier native printer font only.*

Embedded codes can be placed anywhere in the body of the mail message (they will *not* work in the Address or Subject fields). Embedded codes should not wrap to another line. An embedded code statement that wraps to a second line will be ignored.

For a description and example of each e-mail compatible embedded code see [Appendix A, "E-mail Compatible Embedded Codes"](#).

## Composing and Sending a Fax When Working Offline

You can compose a fax when working offline, disconnected from the Domino mail server.

When you send a fax composed offline, it is delivered to your local MAIL.BOX database. It will be sent the next time you connect to the Domino mail server. Also, the Notes dial-up service will re-stamp the mail message with the date and time it is delivered to the Domino mail server. For example, if you compose a fax on Tuesday, and you connect to the Domino mail server on Friday, the fax will be stamped with Friday's date.

Also note that any errors in sending the mail message won't be detected until after you connect to the Domino mail server.

If you are sending a Notes mail message to a fax number, use the same procedure you use when working online (see ["Sending a Fax"](#) on [page 37](#)).

If you are sending a RightFax fax (by selecting **New RightFax Fax** in your Notes mail database), before you can compose a fax offline, you must create a local replica of the EFM Sync database. The database provides data to the fax form, such as sender name and sender fax number.

### Understanding local replication and sending faxes

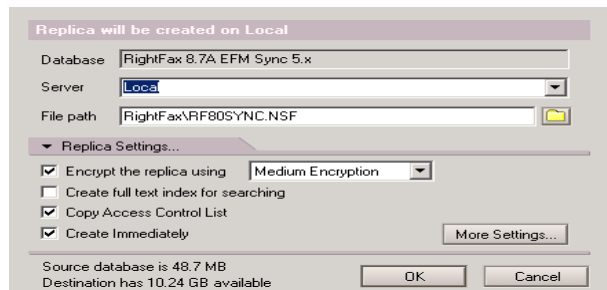
For delivery of the fax after you connect to the Domino server, the RightFax e-mail gateway refers to your fax user document in the EFM Sync database from which you created a replica. If the fax user documents are not in sync, the fax may be returned to you as undeliverable.

By default, the Notes client replicator updates all local replicas each time you connect to the Domino server. However, if local replication settings have been changed, be aware of the consequences for composing faxes offline. For example, if replication has been disabled for your local EFM Sync database, the local data will eventually be out of date.

### To create a local replica of the EFM Sync database

1. In the Notes workspace, click to select the **EFM Sync** icon.
2. On the **File** menu, select **Replication**, and then **New Replica**. The **New Replica** dialog box opens. Complete the entries as shown in the following example.

Figure 3.6 The New Replica Dialog Box



3. Click **OK** to replicate the database.

## Editing Your RightFax User Options in Notes

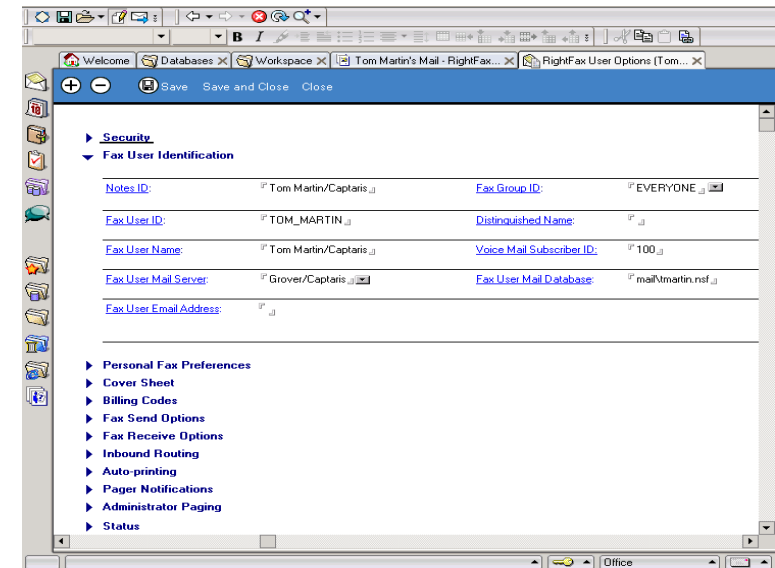
With some exceptions that are determined by your RightFax administrator, you can customize your user settings in your RightFax User Options document.

The EFM Sync database is a mirror of the RightFax database. If you are synchronizing RightFax to Notes, edit user options only in the RightFax administration utility, Enterprise Fax Manager, or the client application, FaxUtil.

### To open the RightFax User Options document

1. Open your mail database and open the **RightFax Settings** view.
2. Open the **RightFax User Options** document.

Figure 3.7 The RightFax User Options in Notes



3. 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*.
4. Save and close the document. All changes will be immediately made in the EFM Sync database.

■ ■ ■

## Chapter 4

# RightFax Logs and Reports in Lotus Notes

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

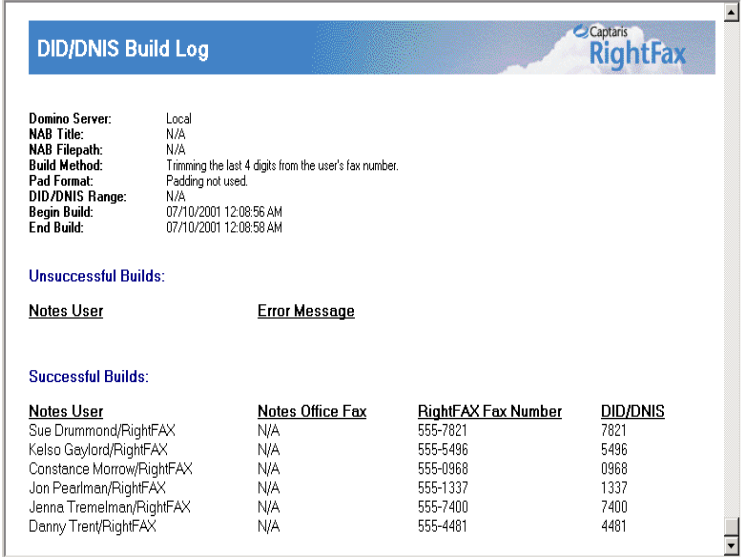
## RightFax Event Logs

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

### DID/DNIS Build Log

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

Figure 4.1 The DID/DNIS Build Log



**DID/DNIS Build Log**

Domino Server: Local  
NAB Title: N/A  
NAB Filepath: N/A  
Build Method: Trimming the last 4 digits from the user's fax number.  
Pad Format: Padding not used.  
DID/DNIS Range: N/A  
Begin Build: 07/10/2001 12:08:56 AM  
End Build: 07/10/2001 12:08:58 AM

**Unsuccessful Builds:**

Notes User	Error Message
------------	---------------

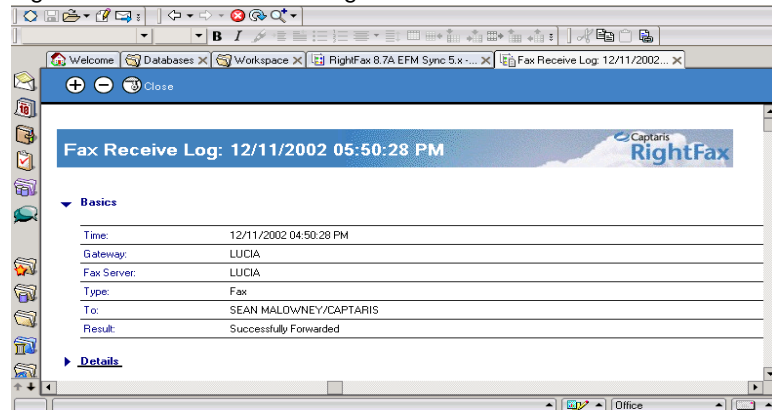
**Successful Builds:**

Notes User	Notes Office Fax	RightFAX Fax Number	DID/DNIS
Sue Drummond/RightFAX	N/A	555-7821	7821
Kelso Gaylord/RightFAX	N/A	555-5496	5496
Constance Morrow/RightFAX	N/A	555-0968	0968
Jon Pearlman/RightFAX	N/A	555-1337	1337
Jenna Tremelman/RightFAX	N/A	555-7400	7400
Danny Trent/RightFAX	N/A	555-4481	4481

## Fax Receive Log

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

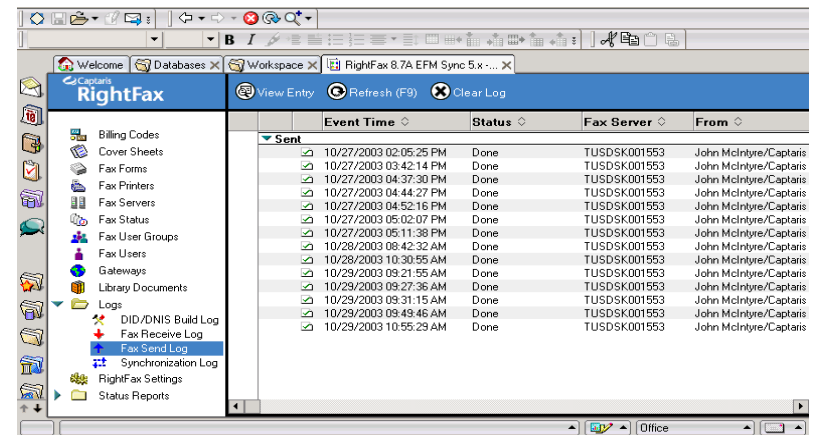
Figure 4.2 The Fax Receive Log



## Fax Send Log

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

Figure 4.3 The Fax Send Log

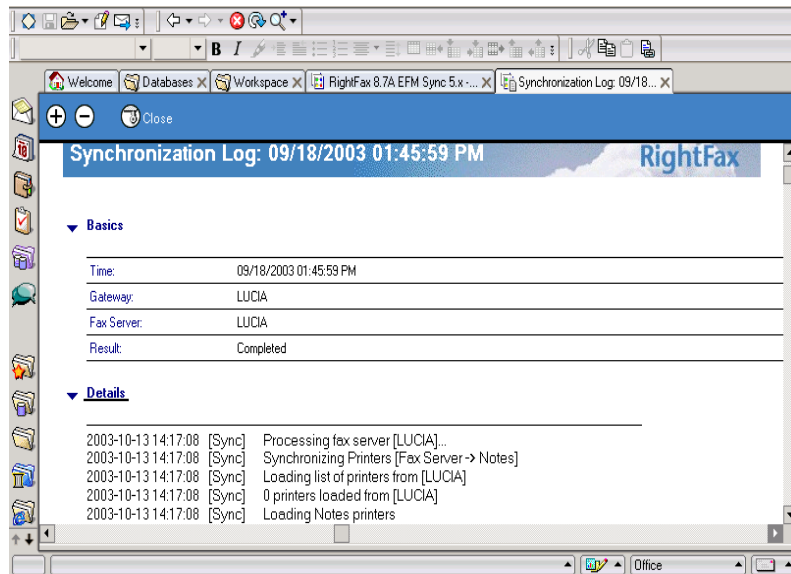


## Synchronization Log

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

Double-click each synchronization log document to display details about the synchronization event. The level of detail in this log depends on the value you specify in the **Synchronization Logging** field in the Fax Server document in the EFM Sync database (see [“Enabling database synchronization”](#) on [page 22](#)).

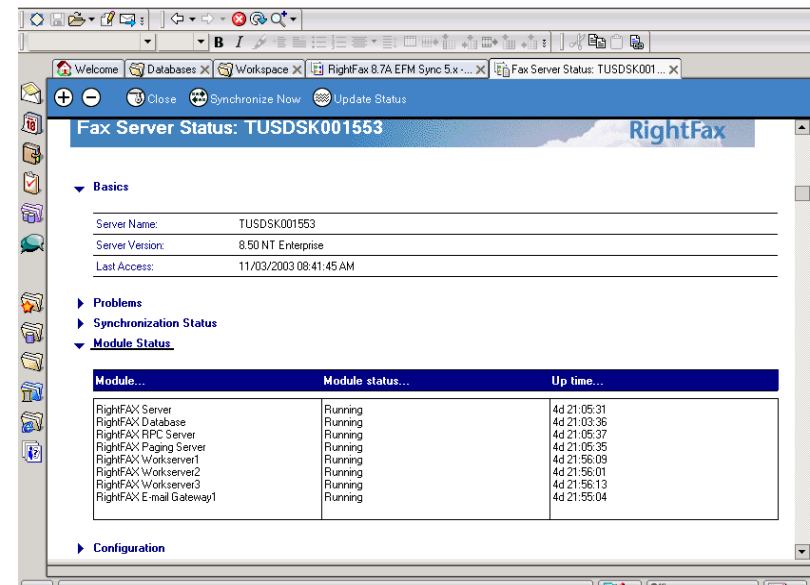
Figure 4.4 The RightFax Synchronization Log



## Fax Server Status Report

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

Figure 4.5 The Fax Server Status Report



## RightFax Status Reports

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

## Gateway Status Report

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

Figure 4.6 The Fax Gateway Status Report

The screenshot shows a web-based report titled "Gateway Status (Gateway: TUSDSK001553 ... Fax Server: TUSDSK001553)". The report is divided into sections: "Basics" and "Gateway Event Status".

**Basics**

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

**Gateway Event Status**

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

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

■ ■ ■

## Appendix A

# E-mail Compatible Embedded Codes

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

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

```
<LIBDOC2:PRICEGUIDE>
```

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

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

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



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

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

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

**ATDATE****Format** <ATDATE:date>

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

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

Maximum field length: 10 characters

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

**ATTIME****Format** <ATTIME:time>

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

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

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

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

Maximum field length: 9 characters

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

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

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

Maximum field length: 15 characters

**Example** <BILLINFO1:4444>

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

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

Maximum field length: 15 characters

**Example** <BILLINFO2:5555>

## CHANNEL

**Format** <CHANNEL:channel#>

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

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

Maximum field length: N/A

**Example** <CHANNEL:3>

## COVER

**Format** <COVER>

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

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

Maximum field length: N/A

## DELETE

**Format** <DELETE>

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

Maximum field length: N/A

## DELETEALL

**Format** <DELETEALL>

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

Maximum field length: N/A

## FCSFILE

**Format** <FCSFILE:file name>

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

Maximum field length: 12 characters

**Example** <FCSFILE:MYCOVER1.PCL>

## FINE

**Format** <FINE>

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

Maximum field length: N/A

## FROMFAXNUM

**Format** <FROMFAXNUM:faxnumber>

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

Maximum field length: 31 characters

**Example** <FROMFAXNUM:(520)555-1234>

**FROMGENFAXNUM****Format** <FROMGENFAXNUM:faxnumber>

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

Maximum field length: 31 characters

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

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

Maximum field length: 31 characters

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

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

Maximum field length: 31 characters

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

Causes all subsequent embedded codes to be ignored.

Maximum field length: N/A

**LIBDOC****Format** <LIBDOC:documentID>

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

Maximum field length: 21 characters

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

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

Maximum field length: 21 characters

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

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

Maximum field length: N/A

**NORMAL****Format** <NORMAL>

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

Maximum field length: N/A

## PREVIEW

**Format** <PREVIEW>

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

Maximum field length: N/A

## PRIORITY

**Format** <PRIORITY:priority>

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

Maximum field length: N/A

**Examples**<PRIORITY:H>  
<PRIORITY:N>

## 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

■ ■ ■



## 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

<b>Application or file format</b>	<b>Supported versions</b>
Access	Versions through 2.0
ANSI text (7 & 8 bit)	All versions
ASCII text (7 & 8 bit)	All versions
Binary group 3 fax	All versions
BMP (including RLE, ICO, CUR, and OS/2 DIB & OS/2 Warp)	Windows versions
CDR (if TIFF image is embedded in it)	Corel Draw versions 2.0 through 9.0
dBASE	Versions through 5.0
DCX (multi-page PCX)	Microsoft Fax
DRW (Micrografx Designer)	Version 3.1
DRW (Micrografx Draw)	Versions through 4.0
EPS	If TIFF image is embedded

Table B1 Supported Document File Formats (Continued)

<b>Application or file format</b>	<b>Supported versions</b>
Freelance for Windows	Version 1.0, 2.0, 96, 97, and Millennium
GIF	Compuserve
HTML	Versions through 3.0
JPEG (includes EXIF)	All versions
Lotus 1-2-3 (DOS & Windows)	Versions through 5.0
Lotus 1-2-3 (OS/2)	Versions through 2.0
Lotus 1-2-3 Charts (DOS & Windows)	Versions through 5.0
Lotus 1-2-3 Charts (OS/2)	Versions through 2.0
Lotus 1-2-3 for SmartSuite	SmartSuite 97, Millennium, and Millennium 9.6
Lotus AMI/AMI Professional	Versions through 3.1
Lotus Symphony	Versions 1.0, 1.1, and 2.0
Microsoft Binder	Version 7.0, Binder 97
Microsoft Excel Charts	Versions 2.x through 7.0
Microsoft Excel for Macintosh	Versions 3.0 through 4.0, 98, and 2001

Table B1 Supported Document File Formats (Continued)

<b>Application or file format</b>	<b>Supported versions</b>
Microsoft Excel for Windows	Versions 2.2 through 2002
Microsoft Multiplan	Version 4.0
Microsoft PowerPoint for Macintosh	Version 4.0, 98, and 2001
Microsoft PowerPoint for Windows	Versions through 2002
Microsoft Rich Text Format (RTF)	All versions
Microsoft Windows Works	Versions through 4.0
Microsoft Word for DOS	Versions through 6.0
Microsoft Word for Macintosh	Versions 4.0 through 2001
Microsoft Word for Windows	Versions through 2002
Microsoft WordPad	All versions
Microsoft Works for DOS	Versions through 2.0
Microsoft Works for Macintosh	Versions through 2.0
Microsoft Works for Windows	Versions through 4.0
Microsoft Write	Versions through 3.0
Novell WordPerfect for DOS	Versions through 6.1
Novell WordPerfect for Macintosh	Versions 1.02 through 3.0
Novell WordPerfect for Windows	Versions through 7.0
Paradox for DOS	Versions through 4.0
Paradox for Windows	Versions through 1.0
PCX bitmap	PC Paintbrush
PICT1 and PICT2 (Raster)	Macintosh standard
QuattroPro for DOS	Versions through 5.0

Table B1 Supported Document File Formats (Continued)

<b>Application or file format</b>	<b>Supported versions</b>
QuattroPro for Windows	Versions through 10
TIFF	Versions through 6
TIFF CCITT Group 3 & 4	Fax Systems
Unicode Text	All versions
UUEncode	No specific version
WordPerfect Graphics (WPG and WPG2)	Versions through 2.0
ZIP	PKWARE versions through 2.04g

■ ■ ■

# Index

## A

- activate the gateway for Lotus Notes 8
- advanced RightFax form 37
- agent
  - Handle Undeliverable Faxes 19
  - initialize user Notes ID 24

## B

- billing codes 31, 40

## C

- configure
  - Gateway for Microsoft Exchange 8
  - Notes and RightFax database synchronization 23
  - Notes ICD processing 27
  - real-time fax status report 30
  - receiving inbound faxes 27
  - sending faxes 29
- Connections Document 32
- cover sheet 31, 39
- create
  - DID/DNIS codes 34
  - phonebook entries 42
  - RightFax administrators 34
  - routing codes 34

create (*continued*)

- unique fax templates for Notes users 13
- CSID 40

## D

- database synchronization, enabling 22
- default user, adding 32
- DID/DNIS Build Log in Notes 45
- DID/DNIS codes 34
- document conversion options 31
- document conversion options in Notes 41

## E

- EFM Sync database
  - adding the default user 32
  - adding users 31
  - configuring 21
  - configuring synchronization 23
  - enabling ICD processing 27
  - enabling receipt of inbound faxes 27
  - enabling sending faxes 29
  - enabling synchronization with RightFax 22
  - full vs. selective replication 25
  - importing users 33
  - overview 21

EFM Sync database (*continued*)

- replicating on a local computer 42
- security 22
- synchronization 22
- synchronizing users 33
- embedded codes, using in Notes mail 42
- enable
  - full vs. selective replication 25
  - Notes and RightFax database synchronization 22
  - Notes ICD processing 27
  - receipt of inbound faxes 27
  - sending faxes 29
- event log 45

## F

- Fax Delivery Failure report 19, 41
- fax factory database 6
- Fax Gateway Status Report 48
- Fax Information dialog box 38
- fax notification 35
- fax printers 31
- fax priority 40
- Fax Receive Log 46
- Fax Send Log 46
- Fax Server Status Report 47
- fax status 41

- fax status reports 47
- faxes
  - file formats for conversion 55
  - forwarding 41
  - previewing 41
  - sending 37
  - sending when offline 42
  - undeliverable 41
- faxes, undeliverable 19
- forwarding faxes 41

## G

- gateway
  - extract databases for installation 19
  - installing 9
  - installing full mail integration 10
  - installing manually 19
  - installing minimal mail integration 14
  - specifying users for fax capability 13
  - starting and stopping 10
  - undeliverable faxes agent 19
  - unique fax templates for users 13
- Gateway for Lotus Notes
  - configuring 8
- gateway service
  - overview 5
  - starting and stopping 10

## H

- Handle Undeliverable Faxes agent 19

## I

- ICD (interprocess communication document)
  - processing 6
- inbound faxing, configuring 27
- install
  - full Notes mail integration 10

- install (*continued*)
  - minimal Notes mail integration 14
  - no Notes mail integration 17
  - Notes and RightFax integration options 6
  - Notes gateway manually 19
- interprocess communication document (ICD)
  - processing 6

## L

- library documents 31, 40

## M

- Microsoft Excel document conversion 31, 41
- Microsoft PowerPoint document
  - conversion 31, 41

## N

- Notes
  - Fax Information dialog box in 38
  - fax notification in 35
  - forwarding faxes in 41
  - initialize user Notes ID agent, initialize user Notes ID agent 24
  - previewing faxes in 41
  - sending faxes when offline 42
  - server-side application conversion 40
  - undeliverable faxes 41
- Notes agent
  - Handle Undeliverable Faxes 19
  - initialize user Notes ID 24
- Notes and RightFax integration options 6
- Notes design, updating 35
- Notes gateway
  - document conversion options 31, 41
  - RightFax event logs 45
  - status reports 47

- Notes gateway (*continued*)
  - synchronizing RightFax and Notes databases 22
- Notes ICD processing 27
- Notes mail integration with RightFax
  - full integration 10
  - minimal integration 14
  - no integration 17
- Notes mail template, refreshing 35
- Notes users
  - adding to EFM Sync database 31
  - configuring database connections 32
  - importing to EFM Sync database 33
- notification
  - of received faxes 35
  - of undeliverable faxes 41

## O

- offline faxing 42
- outbound faxing
  - configuring 29
  - native export process 29
  - Notes client print process 29
  - sending message body and Notes form elements as fax 29
  - sending message body as fax 29
- overlay forms 31, 40

## P

- phonebook entries
  - adding in Notes 42
- previewing faxes 41

## R

- real-time fax status report
  - configuring 30
  - using 41

- RightFax administrators [34](#)
- RightFax document conversion [55](#)
- RightFax event logs [45](#)
- RightFax fax factory database [6](#)
- routing codes [34](#)

## S

- select service account for network access by
  - Notes gateway [9](#)
- send
  - faxes [37](#)
  - faxes using client print process [29](#)
  - faxes using native export process [29](#)
- server-side application conversion options in
  - Notes [31, 40](#)
- service account, selecting for network access
  - by Notes gateway [9](#)
- Smart-Resume [39](#)
- specifying Notes users for fax capability [13](#)
- start Notes gateway service [10](#)
- status reports [47](#)
- stop Notes gateway service [10](#)
- Synchronization Log [46](#)
- synchronize
  - Notes and RightFax databases [22](#)
  - Notes and RightFax users [33](#)

## U

- undeliverable faxes [19, 41](#)
- users
  - adding to EFM Sync database [31](#)
  - importing to EFM Sync database [33](#)
  - setting options for [43](#)

## V

- viewing the status of a fax [41](#)
- Visio document conversion [31, 41](#)

