



Version 8.7
Installing and Using the
WinFax PRO Integration Module

Edition

Information in this document applies to version 8.7 of the Guide for Installing and Using the WinFax PRO Integration Module.

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Installing and Using the WinFax PRO Integration Module

The WinFax PRO Integration Module integrates the Symantec WinFax PRO fax software for individual workstations with the RightFax network fax server software. This allows organizations with large WinFax install bases to upgrade to the RightFax fax server solution without having to introduce a new fax client interface. It also allows organizations with RightFax servers to make use of the powerful client features of WinFax PRO.

The WinFax PRO Integration Module provides a WinFax HAL interface to the RightFax server. Using this module, WinFax is able to communicate with the RightFax server as if it were an internal fax modem.

This module requires:

- RightFax 7.0 SP1 or higher
- WinFax PRO 9.02 or higher

The WinFax PRO Integration Module is included with WinFax PRO versions 9.02c and later. When installing these versions of WinFax PRO, the **Custom** install option lets you select the RightFax integration files. (The WinFax PRO **Typical** install option does not automatically install the WinFax PRO Integration Module.) If you have installed the RightFax integration files as part of your WinFax PRO installation, you can skip the following instructions.

If you selected the **Typical** install option for WinFax PRO, or if you have installed an earlier version of WinFax PRO, you must install the WinFax PRO Integration Module separately on each computer running WinFax PRO. The WinFax PRO Integration Module

installation file can be downloaded for free from the RightFax Web site at www.rightfax.com/support/download.htm. It is also located on the RightFax server installation CD in the WinFax folder.

Installing the WinFax PRO Integration Module

Before installing this module, make sure that your organization's RightFax server is version 7.0 SP1 or higher and that the fax client computer is running WinFax PRO 9.02 or higher.

To install the integration module on each computer running WinFax PRO

1. Browse the RightFax server installation CD to the WinFax folder and run the WinFax Hal Integration Module installer. The WinFax Hal Integration Module Setup wizard opens.
2. Click **Next** to begin installing the necessary files.
3. When the installation is complete, you will be prompted to run the WinFax Setup program to configure WinFax for RightFax server integration. Check this option to run WinFax PRO Program Setup (described in the next section).

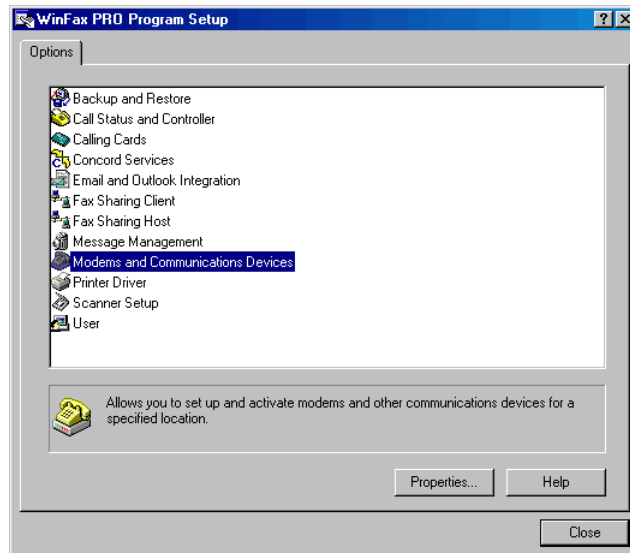
Configuring the WinFax PRO Integration Module

After you install the WinFax PRO Integration Module, each WinFax client must be configured to connect to the RightFax server. These settings can be modified at any time by running WinFax PRO Program Setup.

To Configure WinFax PRO for RightFax Integration

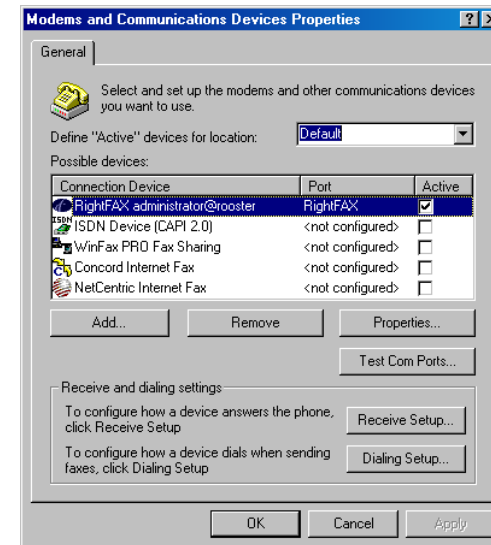
1. If you did not run the WinFax PRO Program Setup during installation (described above), open the WinFax PRO Message Manager and select **Tools > Program Setup**. This opens the **WinFax PRO Program Setup** dialog box:

Figure 0.1 The WinFax PRO Program Setup Dialog Box



2. Double-click the **Modems and Communications Devices** option. This opens the **Modem and Communications Devices Properties** dialog box:

Figure 0.2 Activating RightFax in WinFax PRO



Note If you have accounts on multiple RightFax servers, you can add additional servers in the Connection Device list by clicking the **Add** button. Check the **Other** option and select **RightFax Server Interface**. A configuration wizard will step you through the same configuration options described here.

3. Select the **RightFax Server Interface** check box. A message will appear asking if you want to configure the RightFax Server Interface. Click **Yes**. This starts the Install New Device Type installation wizard.
4. Click **Next** to start the installation. Enter the name of the RightFax server to connect to and either select the **NT Authentication** option (for automatic user authentication on the RightFax server) or enter a RightFax user ID. Click **Next**.

5. If you specified a RightFax user ID in the previous step, enter the password for the specified user and click **OK**.
6. Click **Finish** to exit the New Modem Type Install Wizard.

When prompted to select locations, check only the locations where the RightFax server will be available and then click **OK**. If multiple fax devices are enabled for a single location, WinFax will randomly choose the fax device to use. In most cases, when a RightFax server is enabled for a location, all other modems and fax devices should be disabled for that location. When multiple RightFax servers are enabled for one location, WinFax will randomly select the server to use for sending faxes but will receive incoming faxes from both servers.

7. Enter an area code and click **OK** to return to the **Modem and Other Fax Device Properties** dialog box. Click **OK** and then **Close** to complete the configuration.

Once the WinFax PRO Integration is properly installed and configured, outgoing faxes generated in WinFax will be sent via the RightFax server. Please refer to your WinFax documentation for information on creating new faxes in WinFax PRO.

In addition, new faxes received by the RightFax server will be forwarded to your WinFax mailbox. When the RightFax server interface is initially set up, any unviewed faxes in your RightFax FaxUtil mailbox will be forwarded to WinFax.

Setting the RightFax Server Interface Properties

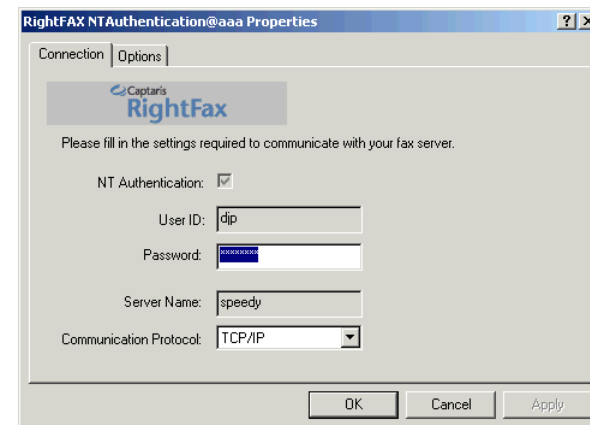
Each RightFax server installed as a fax device in WinFax PRO has several optional settings that let you customize how fax images are handled by the server.

To set RightFax server properties

1. Open the WinFax PRO Message Manager and select **Tools > Program Setup**. This opens the **WinFax Pro Program Setup** dialog box.
2. Double-click the **Modems and Other Communications Devices** option. This opens the **Modem and Communications Devices Properties** dialog box.
3. Select the **RightFax Server Interface** option and click the **Properties** button. This opens the **RightFax Client Profile Properties** dialog box. This dialog box contains two tabs: **Connection** and **Options**.

Setting the connection properties

Figure 0.3 Setting the RightFax Connection Properties



Because your RightFax user ID and server name are used to define this as a WinFax fax device, these settings cannot be changed. To modify either of these settings, you must add a new RightFax server interface in WinFax (see [“Configuring the WinFax PRO Integration Module”](#) on page 4).

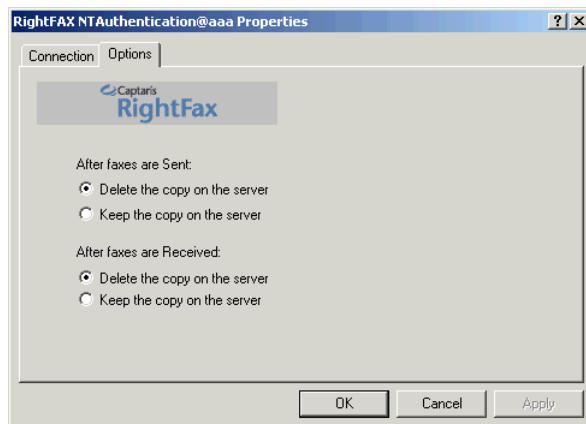
Password Enter your FaxUtil password. This setting must match your password in RightFax in order to send and receive faxes. Changing the password here does not automatically set a new password in RightFax.

Communication Protocol Select the network communication protocol used for communication between the WinFax PRO client computer and the RightFax server.

Setting the server options

When the connection properties are correctly set, click the **Options** tab.

Setting the RightFax Server Options



These options let you specify what happens to sent and received faxes on the RightFax server.

Under **After Faxes are Sent**, check **Delete the Copy on the Server** to delete WinFax-generated fax images from the RightFax server after they have been successfully sent. A copy of the fax will be saved in your WinFax Send Log. Check **Keep the Copy on the Server** to keep a copy of all WinFax-generated fax images on the RightFax server after they have been successfully sent. Saved outgoing faxes are stored in your RightFax FaxUtil mailbox.

Under **After Faxes are Received**, check **Delete the Copy on the Server** to delete received fax images from the RightFax server after they have been forwarded to your WinFax mailbox. Check **Keep the Copy on the Server** to keep copies of all received fax images on the RightFax server after they have been successfully forwarded to your WinFax mailbox. Saved incoming faxes are stored in your RightFax FaxUtil mailbox.

Connecting to the RightFax Server

When at a location where a RightFax server is enabled as a fax device, WinFax PRO will attempt to connect to the fax server each time you start the WinFax Message Manager or Controller. When WinFax is successfully connected to a RightFax server, a RightFax icon is displayed in the Windows taskbar. If WinFax is unable to connect to the RightFax server, the RightFax connection icon will display a red ×.

To manually disconnect or connect to the RightFax server, right-click the RightFax connection icon. A shortcut menu will display the RightFax server profile to use as well as **Connect** and **Disconnect** options.

Creating faxes offline

When the RightFax server is configured as the current WinFax fax device but is not actually connected, faxes can still be created and queued to be sent later. This may be useful if a laptop, for example, is temporarily disconnected from the network. Queued faxes appear in your WinFax PRO Message Manager Outbox with a status of "Waiting." The next time a connection with the RightFax server is established, the queued faxes will be sent.

Creating RightFax Phonebooks in WinFax

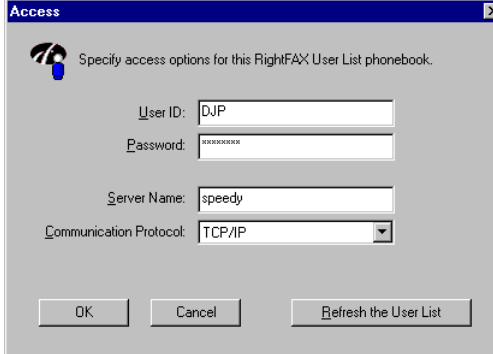
The RightFax/WinFax PRO Integration Module lets you create two new phonebooks in WinFax: a phonebook containing your existing RightFax FaxUtil phonebook entries and a phonebook containing all the RightFax users on your network.

To create a new RightFax phonebook

1. Open the WinFax PRO Message Manager and click the **Phonebooks** button in the side bar.
2. Right-click **My Phonebook** and select **New Phonebook** from the shortcut menu.
3. Check the **Link to an existing phonebook from another program** option and click **Next**.
4. Type a name for the new phonebook and click **Next**.
5. When prompted to select a phonebook type, check **Other**.
6. Scroll down the list of phonebook types. Select **RightFax Personal Phonebook** to create a WinFax phonebook containing all the entries in your existing fax phonebook. Select **RightFax User List Phonebook** to create a WinFax phonebook containing all the other RightFax users on the server. Click **Next**.

7. Click the **Set Information** button to open the **Access/Connection** dialog box:

Figure 0.4 Entering Your RightFax User Information



The screenshot shows a dialog box titled "Access" with a close button in the top right corner. The main text reads "Specify access options for this RightFAX User List phonebook." Below this text are four input fields: "User ID:" with the value "DJF", "Password:" with a masked password "*****", "Server Name:" with the value "speedy", and "Communication Protocol:" with a dropdown menu showing "TCP/IP". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Refresh the User List".

8. Select **NT Authentication** to use your Windows NT login information to access the phonebook, or enter your RightFax user ID and password. Enter the name of the RightFax server that contains your user account. You can optionally set a new network communication protocol. Click **OK**.
9. Click the **Finish** button to complete the setup. The new phonebook will appear in the Message Manager Phonebook List.

Imported RightFax phonebooks are not automatically updated if they change in RightFax. If either your FaxUtil phonebook or the RightFax user list changes, you must manually update the phonebook in WinFax. Right-click the phonebook in the WinFax Phonebook List and select **Properties** from the menu. Click the **Refresh** button to add new entries and delete any that have been removed from RightFax.

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