



Version 9.0  
Document Management Connector Guide

## Edition

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# Chapter 1

## Introduction

The RightFax Document Management Connector integrates the RightFax client software with DOCS Open® by Hummingbird or iManage™ by NetRight Technologies. DOCS Open and iManage are client/server-based document management and tracking systems.

With the RightFax Document Management Connector users can:

- Fax documents directly from DOCS Open or iManage via the RightFax server.
- Import sent or received faxes for tracking and billing purposes.
- Track fax events in the document history.
- Automatically retrieve billing codes for use on outgoing faxes.

The RightFax Document Management Connector is designed for use with 32-bit client installations of DOCS Open, versions 3.7 through 3.9, or iManage DeskSite 6.01a and infoRite versions 5.0 through 5.2.

### Important Licensing Information

Each RightFax Document Management Connector software license allows you to install the connector on 50 client workstations only. Additional licenses can be purchased separately, each allowing an additional 50 client installations.

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## Chapter 2

# Installing and Configuring the Connector for DOCS Open

The RightFax Document Management Connector for DOCS Open is comprised of two components: a server component and a client component. The server component is installed on the RightFax server, and the client component is installed on each DOCS Open workstation.

The RightFax Document Management Connector is designed for use with 32-bit client installations of DOCS Open (versions 3.7 through 3.9).

Before proceeding with the connector installation, DOCS Open must be properly configured to recognize and support RightFax document types.

## Configuring the DOCS Open Server

To be able to view fax images using Docs Open, you must have installed a fax viewing application in DOCS Open such as DOCS Image or Mailroom. You must also specify the name of the application you want to use in the PCDOCS.INI file (described in [Appendix A, "Customizing the PCdocs.ini File"](#)).

## To configure the DOCS Open server

1. On the DOCS Open server, run the DOCS Open Administrator Library Maintenance program. Double-click the **Document Types** icon to open the **Document Types Select** dialog box.
2. Click **New** to open the **Document Types** dialog box.

Figure 2.1 The Document Types dialog box

The screenshot shows the 'Document Types' dialog box with the following configuration:

- Type ID: SENFAX
- Description: Sent Faxes
- Full Text Index:
- Default Storage Type:  Archive,  Delete,  Keep,  Optical
- Retention Days: [Empty]
- Versions to Keep: [Empty]
- Maximum Versions: 99
- Maximum Sub-Versions: 26
- Keep Criteria:  By Last Edit,  By Versions
- Second Retention Storage Type:  Archive,  Delete,  Keep
- Second Retention Days: [Empty]
- Target Document Server: [Empty]
- Buttons: OK, Cancel

3. In the **Type ID** box, type "SENTFAX". In the **Description** box, type "Sent Faxes". The remaining boxes in this dialog box should be set to match those for other standard document types in DOCS Open. Click **OK** to return to the **Document Types Select** dialog box.
4. Click **New** to open the **Document Types** dialog box again.
5. In the **Type ID** box, type "RECVFAX". In the **Description** box, type "Received Faxes". As with the SENTFAX document type, the other boxes should be set to match those for other standard document types in DOCS Open. Click **OK** and then **Close** to return to Library Maintenance.

## Installing the Document Management Connector

The Document Management Connector is shipped on a CD separately from the RightFax server CD. You must have purchased and licensed this product separately to receive the Document management Connector Installation CD.

Before Running the Document Management Connector installation, you must have installed the RightFax server software and copied the client install files to a network file share. Both of these procedures are described in the *RightFax Installation Guide*.

### To install the connector on the RightFax server

1. Insert the RightFax Document Management Connector CD into the RightFax server.
2. Run Setup.exe from the CD.
3. When prompted, specify the location of the network file share folder where you have copied the RightFax client installation files.
4. Follow the instructions on screen to complete the installation.

## Installing the DOCS Open Integration on Client Workstations

After the connector has been installed, you must perform a client installation on each DOCS Open client workstation that will integrate with RightFax.

Before installing the DOCS Open integration on the client, you must add the following line to the Win.ini file on the client workstation:

```
[DOCS OPEN]
Location=\\SQLDOCSServername\resource\progra~1\hummin~1\docsopen\progs
```

This allows the client install to locate the DOCS Open server and write to its PCDOCS.ini file.

To install the DOCS Open client, follow the instructions in the *RightFax Installation Guide* for installing RightFax client applications from a network file share. On the **Custom Setup** screen, expand the **RightFax Clients** group and select **DOCS Open Integration**. Complete the installation according to the instructions in the *RightFax Installation Guide*.

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## Chapter 3

# Working with Faxes in DOCS Open

One of the primary functions of the Document Management Connector is to import fax documents, both sent and received, into DOCS Open so they can be tracked and managed as conveniently as your other documents. The connector also lets you view and delete faxes in your RightFax fax mailbox directly from DOCS Open.

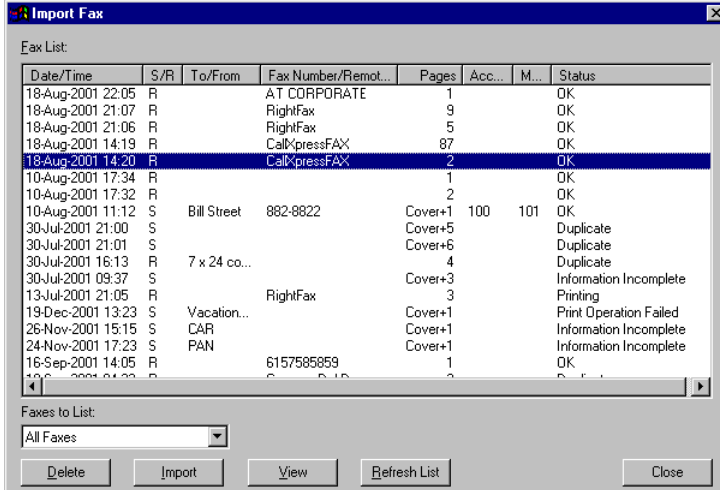
### Importing Fax Documents into DOCS Open

After the Document Management Connector has been installed on your client workstation, you can import faxes as documents into the DOCS Open system.

### To import faxes

1. From the DOCS Open main screen, select **Import Fax** from the **Document** menu. This opens the **Import Fax** dialog box. This dialog box lists all the faxes in your RightFax mailbox.

Figure 3.1 The Import Fax Dialog Box



Date/Time	S/R	To/From	Fax Number/Remot...	Pages	Acc...	M...	Status
18-Aug-2001 22:05	R		AT CORPORATE	1			OK
18-Aug-2001 21:07	R		RightFax	9			OK
18-Aug-2001 21:06	R		RightFax	5			OK
18-Aug-2001 14:19	R		CallXpressFAX	87			OK
18-Aug-2001 14:20	R		CallXpressFAX	2			OK
10-Aug-2001 17:34	R			1			OK
10-Aug-2001 17:32	R			2			OK
10-Aug-2001 11:12	S	Bill Street	882-8822	Cover+1	100	101	OK
30-Jul-2001 21:00	S			Cover+5			Duplicate
30-Jul-2001 21:01	S			Cover+6			Duplicate
30-Jul-2001 16:13	R	7 x 24 co...		4			Duplicate
30-Jul-2001 09:37	S			Cover+3			Information Incomplete
13-Jul-2001 21:05	R		RightFax	3			Printing
19-Dec-2001 13:23	S	Vacation...		Cover+1			Print Operation Failed
26-Nov-2001 15:15	S	CAR		Cover+1			Information Incomplete
24-Nov-2001 17:23	S	PAN		Cover+1			Information Incomplete
16-Sep-2001 14:05	R		6157585859	1			OK

Faxes to List:  
All Faxes

Delete Import View Refresh List Close



**Note** You can view or delete any fax from the list by clicking the fax and clicking View or Delete. Deleting a fax from this dialog box also removes the fax from your FaxUtil mailbox.

- Click the type of faxes to display (“unviewed received faxes,” “all received faxes,” “all sent faxes,” or “all faxes”) in the **Faxes to List** box.
- Click the fax to import, and then click **Import**. This opens the **Document Profile** dialog box.

Figure 3.2 The Document Profile Dialog Box

## Sending Faxes from DOCS Open

Another key feature of the Document Management Connector is the ability to fax one or more documents directly from DOCS Open and record the fax event in the document’s history.

### To fax DOCS Open documents

- In DOCS Open, locate and click the document(s) to fax. If you select multiple documents, all of the documents will automatically be combined into one fax.
- Select **Fax** from the **Document** menu, or right-click the selected document(s) to open a shortcut menu, and click **Fax**. DOCS Open automatically launches the associated application for the document(s), prints it to the RightFax fax printer, and opens the **Fax Information** dialog box. If the document contains billing codes, the codes will appear in the **Accounting** boxes.

Figure 3.3 The Fax Information Dialog Box

**Note** In DOCS Open, each document name must be unique. For this reason, the Document Management Connector automatically includes each fax’s unique RightFax ID in the Document Name box.

DOCS Open fills in the **Document Name** (which includes a unique RightFax document ID), **Author**, and **Document Type** (either “SENTFAX” or “RECVFAX”) boxes. When importing sent faxes, DOCS Open also fills in the **Description** box with text from the **Notes** box in the fax.

- Complete any additional boxes you want to include, and then click **OK** to import the fax.

3. Complete all required boxes and any additional fax addressing information you want.
4. When you have completed the addressing information, click **Send** to transmit the fax.

### Faxing from within a document's native application

If you open a document in DOCS Open and are working in that document's native application, you can easily fax the document directly from the native application. Print the document and select "RightFax Fax Printer" as the printer. Complete the **Fax Information** dialog box, and click **Send** to transmit the fax. A record of the fax event will be stored in the document's history.

### Automatic billing code verification

If the document you are faxing contains billing codes, the billing codes appear in the **Fax Information** dialog box in the **Account Code** and **Matter Code** boxes. If you change the billing codes, the Document Management Connector will query DOCS Open and confirm that the new billing codes are valid. If the billing code is not valid, the connector will display the message "Invalid Client/Matter Code."

### Document history

When you fax a document from within DOCS Open, the entry "Faxed via RightFax" is added to that document's history in the **Type** column.

## Retrieving DOCS Open Billing Codes

The Document Management Connector lets you access the billing codes list in DOCS Open for use in all outbound faxes. Each client workstation must be configured individually to access DOCS Open billing codes.

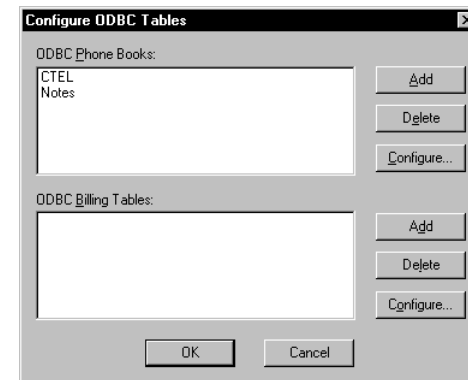
### RightFax ODBC configuration

To access DOCS Open billing codes, RightFax must first be configured to properly read the ODBC billing code source table.

#### To configure ODBC in RightFax

1. Click the RightFax tray icon in the corner of the taskbar to open a shortcut menu. Click **ODBC Configuration**. This opens the **Configure ODBC Tables** dialog box.

Figure 3.4 The Configure ODBC Tables Dialog Box



2. Click **Add** under **ODBC Billing Tables**. This opens the **Configure ODBC Billing Table** dialog box.

Figure 3.5 The Configure ODBC Billing Table Dialog Box

The screenshot shows the 'Configure ODBC Billing Table' dialog box with the following details:

- Billing Table Name:** DOCS Open
- ODBC Source:** DKEMO
- SELECT...**
  - Billing Info #1 Field: c.client\_id
  - Billing Info #2 Field: m.matter\_id
  - Description #1 Field: c.client\_name
  - Description #2 Field: m.matter\_name
- FROM...** docsadm.client as c, docsadm.matter as m
- WHERE...** m.client\_id = c.system\_id
- ORDER BY...** c.client\_name
- ODBC User ID:** docuser (with checkbox 'Use RightFAX User ID')
- ODBC User Password:** (masked) (with checkbox 'Use RightFAX Password')
- Records to load at once:** 250
- SQL Cursor Type:** Dynamic

3. In the **Billing Table Name** box, type a descriptive name for this billing code table.
4. Click the browse button next to the **ODBC Source** box and select "DOCS Open ODBC" driver.
5. Relate the fields of the DOCS Open database to the standard RightFax billing code fields. This is done with an SQL query statement. If the system administrator configured the DOCS Open database with the default settings, these boxes can be filled in exactly as shown in the example (see "Figure 3.5: The Configure ODBC Billing Table Dialog Box"). Otherwise, use the examples but substitute actual field names.
6. In the **ODBC User ID** and **ODBC User Password** boxes, fill in the ID and password necessary to access the database. If the ID and password match those used to log on to RightFax, you can select the check boxes instead.

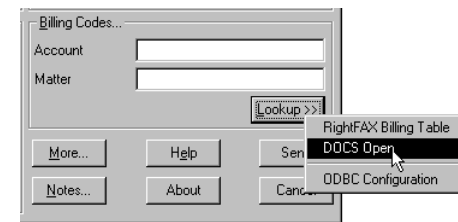
7. If you have a very large database of billing codes, you can limit the number of records displayed at one time by entering the limit in the **Records to Load at Once** box.
8. Set **SQL Cursor Type** to "Dynamic." When you have completed the dialog box, click **OK**.

### Querying DOCS Open billing codes

After you have configured RightFax to read DOCS Open ODBC billing codes, you can access DOCS Open billing codes when sending faxes.

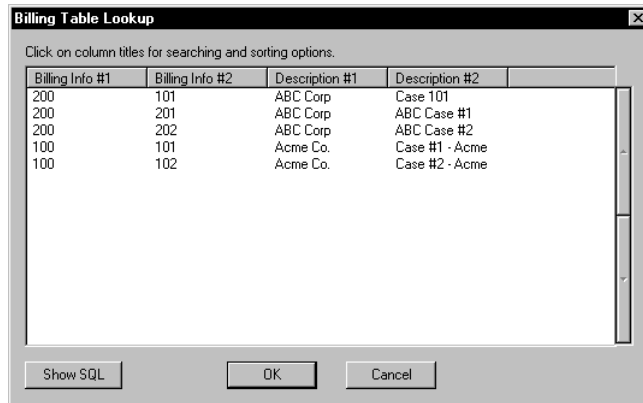
In the RightFax **Fax Information** dialog box, click **Lookup** to select RightFax or DOCS Open billing codes.

Figure 3.6 The Lookup Menu



Click **DOCS Open**. This opens the **Dialing Table Lookup** dialog box listing DOCS Open billing codes.

Figure 3.7 The Billing Table Lookup Dialog Box



If you limited the number of records displayed at one time in the **Records to Load at Once** box in the **Configure ODBC Billing Table** dialog box (page 12), you will see only the specified number of records. To view the previous or next batch of codes, click the arrows to the right of the list. Click the billing code information you want, and click **OK** to enter it in the **Fax Information** dialog box.

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## Chapter 4

# Installing the Connector for iManage

The RightFax Document Management Connector for iManage is comprised of two components: a server component and a client component. The server component is installed on the RightFax server, and the client component is installed on each iManage workstation.

The RightFax Document Management Connector is designed for use with iManage DeskSite 6.0 and infoRite versions 5.0 through 5.2. This guide describes installing and using with infoRite.

## Installing the Document Management Connector

The Document Management Connector is shipped on a CD separately from the RightFax server CD. You must have purchased and licensed this product separately to receive the Document management Connector Installation CD.

Before Running the Document Management Connector installation, you must have installed the RightFax server software and copied the client install files to a network file share. Both of these procedures are described in the *RightFax Installation Guide*.

### To install the connector on the RightFax server

1. Insert the RightFax Document Management Connector CD into the RightFax server.
2. Run Setup.exe from the CD.
3. When prompted, specify the location of the network file share folder where you have copied the RightFax client installation files.
4. Follow the instructions on screen to complete the installation.

## Installing the iManage Integration on Client Workstations

After the connector has been installed, you must perform a client installation on each iManage client workstation that will integrate with RightFax.

To install the iManage client, follow the instructions in the *RightFax Installation Guide* for installing RightFax client applications from a network file share. On the **Custom Setup** screen, expand the

**RightFax Clients** group and select **iManage Integration**.  
Complete the installation according to the instructions in the  
*RightFax Installation Guide*.

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## Chapter 5

# Working with Faxes in iManage

One of the primary functions of the Document Management Connector is to import fax documents, both sent and received, into iManage so they can be tracked and managed as conveniently as your other documents. The connector also lets you view and delete faxes in your RightFax fax mailbox directly from the iManage client application.

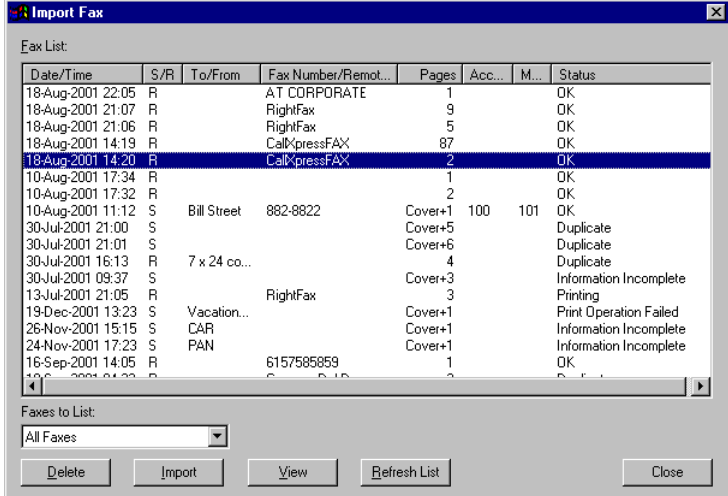
### Importing Fax Documents into iManage

Once the Document Management Connector has been installed on your client workstation, you can import faxes as documents into the iManage system.

#### To import faxes

1. In the iManage desktop, click the document folder that you want to import the fax into.
2. From the infoRite desktop, select **RightFax** from the **Document** menu, and then click **Import Fax**. This opens the **Import Fax** dialog box, which lists all the faxes in your RightFax mailbox.

Figure 5.1 The Import Fax Dialog Box



Date/Time	S/R	To/From	Fax Number/Remot...	Pages	Acc...	M...	Status
18-Aug-2001 22:05	R		AT CORPORATE	1			OK
18-Aug-2001 21:07	R		RightFax	9			OK
18-Aug-2001 21:06	R		RightFax	5			OK
18-Aug-2001 14:19	R		CallXpressFAX	87			OK
18-Aug-2001 14:20	R		CallXpressFAX	2			OK
10-Aug-2001 17:34	R			1			OK
10-Aug-2001 17:32	R			2			OK
10-Aug-2001 11:12	S	Bill Street	882-8822	Cover+1	100	101	OK
30-Jul-2001 21:00	S			Cover+5			Duplicate
30-Jul-2001 21:01	S			Cover+6			Duplicate
30-Jul-2001 16:13	R	7 x 24 co...		4			Duplicate
30-Jul-2001 09:37	S			Cover+3			Information Incomplete
13-Jul-2001 21:05	R		RightFax	3			Printing
19-Dec-2001 13:23	S	Vacation...		Cover+1			Print Operation Failed
26-Nov-2001 15:15	S	CAR		Cover+1			Information Incomplete
24-Nov-2001 17:23	S	PAN		Cover+1			Information Incomplete
16-Sep-2001 14:05	R		6157585859	1			OK



**Note** You can view or delete any fax from the list by clicking the fax and clicking View or Delete. Deleting a fax from this dialog box also removes the fax from your RightFax mailbox.

3. Click the type of faxes to display (“unviewed received faxes,” “all received faxes,” “all sent faxes,” or “all faxes”) in the **Faxes to List** box.

- Click the fax to import, and then click **Import**. This opens the **New Document Profile** dialog box.

Figure 5.2 The New Document Profile Dialog Box

iManage fills in the **Description** box and includes the date when the fax was sent or received and information about the destination or origination.



**Note** You can import one fax document at a time into iManage. If you want to import multiple faxes, you must repeat these steps for each fax.

- Complete the remaining boxes, as defined by the iManage system administrator. When you have completed the entries in the dialog box, click **OK** to import the fax.

## Sending Faxes from iManage

Another key feature of the Document Management Connector is the ability to fax one or more documents directly from iManage and record the fax event in the document's history.

### To fax iManage documents

- Click the document(s) to fax in the infoRite desktop. If you select multiple documents, all of the documents will be automatically combined into one fax.
- On the **Document** menu, click **RightFax**, and then click **Send Fax**. iManage launches the associated application for the document(s), prints it to the RightFax fax printer, and opens the **Fax Information** dialog box. If the document contains billing codes, the codes will appear in the **Accounting** boxes.

Figure 5.3 The Fax Information Dialog Box

- Complete all required boxes and any additional fax addressing information you want.
- When you have completed the addressing information, click **Send** to transmit the fax.

## Document history

When you fax a document from within iManage, a print activity from the RightFax application will be logged in the document's history. An additional print activity from the Manage32 application will also be logged as an automatic function of iManage.

## Faxing from within a document's native application

If you open a document in iManage and are working in that document's native application, you can easily fax the document directly from the native application. Print the document and select "RightFax Fax Printer" as the printer. Complete the **Fax Information** dialog box, and click **Send** to transmit the fax. Note that no record of the fax event will be stored in the document's history.

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## Appendix A

# Customizing the PCdocs.ini File

When you install the Document Management Connector, several entries are added to the PCdocs.ini file. In most cases, you will not need to modify these settings, however each setting and its function is listed here to allow you to customize and optimize your DOCS Open installation.

Entry	Description
[RightFax] Application= <i>FaxViewer</i>	This setting specifies the name of the application to use for viewing faxes from DOCS Open. Enter the name of the application to use on this line.
[RightFax] SentDocType= <i>SentFax</i> RecvDocType= <i>RecvFax</i>	During installation, you specified the names for DOCS Open document types for sent and received faxes as "SentFax" and "RecvFax." These can be changed here.

Entry	Description
[RightFax] BILLINFO1= <i>MATTER.CLIENT_ID.CLIENT_ID</i> BILLINFO2= <i>MATTER.MATTER_ID</i>	The Document Management Connector associates RightFax billing code #1 with the DOCS Open <b>Client</b> field, and billing code #2 with the DOCS Open <b>Matter</b> field. This setting tells RightFax the names of these fields in DOCS Open.
[EventsApi] dll1= <i>C:\Program Files\RightFax\rfdocs.dll</i>	The Document Management Connector adds several new menu items and other features to DOCS Open. This setting tells DOCS Open where to find the file that loads these features on startup. There may be other files specified here depending on your particular DOCS Open configuration.

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