

**RightFAX
Document Management
Connector**

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This Agreement sets forth the entire agreement of the parties and supersedes all prior understandings and agreements, written or oral.

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RightFAX Document Management Connector

In this chapter:

- The RightFAX Document Management Connector
- Using this Guide and Other Learning Tools
- Technical Support
- Configuring DOCS Open
- Installing the Document Management Connector

The RightFAX Document Management Connector

The RightFAX Document Management Connector lets you integrate your RightFAX fax client software with the DOCS Open document management, tracking, and billing system by PC DOCS. With the Document Management Connector for DOCS Open you can:

- Automatically retrieve DOCS Open billing codes to outgoing faxes.
- Verify billing codes on outgoing faxes in DOCS Open.
- Import sent or received faxes into DOCS Open for tracking and billing.
- Send fax documents directly from DOCS Open.
- Retrieve billing codes in RightFAX from DOCS Open or any ODBC source.
- Update document history in DOCS Open for sent and received faxes.

The RightFAX Document Management Connector is designed for use with 32-bit client installations of DOCS Open only.

Important Licensing Information

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

Using this Guide and Other Learning Tools

The [RightFAX Document Management Connector Guide](#) is designed for use by RightFAX clients and administrators who will be installing, configuring, and using the Document Management Connector for DOCS Open.

This guide assumes that you have a basic working knowledge of RightFAX and DOCS Open, as well as your computer and the conventions used in most software applications for your workstation type.

In addition to this [RightFAX Document Management Connector Guide](#), RightFAX provides several additional sources for information on getting the most out of your RightFAX software:

RightFAX User's Guide

The [RightFAX User's Guide](#) is a reference for RightFAX users at every level of expertise. It is a comprehensive guide to all the features and functions of FaxUtil, RightFAX's client interface.

RightFAX Administrator's Guide

The [RightFAX Administrator's Guide](#) contains detailed instructions on installing and configuring RightFAX for both the server and the client workstations. This guide is specifically designed for RightFAX administrators and includes the technical information necessary to manage the RightFAX fax server.

RightFAX Optional Modules Guide

The [RightFAX Optional Modules Guide](#) is included when you purchase RightFAX Enterprise Suite or any one or more of the optional RightFAX modules (which can be purchased separately). This guide provides information on installing, using, managing, and integrating the following utilities with your RightFAX software:

- RightFAX E-mail Gateway
- RightFAX Web Client
- RightFAX Docs on Demand
- RightFAX Teleconnect
- RightFAX Optical Character Recognition (OCR)
- RightFAX PScript/PDF Conversion

Please contact RightFAX at (520) 320-7000 for more information on using or purchasing these or any of RightFAX's powerful, fully integrated utilities.

RightFAX Fax Board Guide

The RightFAX Fax Board Guide provides installation, testing, and configuration instructions for all supported fax hardware.

Quick Reference Card

Keep this card close to your computer for quick and easy access to all the most common FaxUtil functions and features.

Online Help

RightFAX's Online Help is a convenient and easy-to-use source of assistance. You can access the Online Help by selecting the Help menu in any FaxUtil or FaxAdmin window. Online help lets you scan for help by topic, or search for key words and terms.

RightFAX Training

Count on RightFAX classroom training to enhance your RightFAX product knowledge. Technical, administrative, and user training programs provide you with the tools to optimize your RightFAX solution, and provide you with the knowledge to fully utilize RightFAX in your environment. Customized training is also available to meet your organization's specific needs. Classes are held throughout the year at the RightFAX corporate office in Tucson, Arizona. You may also choose the convenience of RightFAX training at your own location. For more information on RightFAX training classes and schedules, please visit our Web site at www.rightfax.com.

Technical Support

Your Customer Support Guide (enclosed in the product box) includes detailed information about the support options available to RightFAX customers. Please fill out the *RightFAX Software Warranty & Registration Card* and return it immediately. If you have questions of a technical nature, please contact your organization's RightFAX administrator or network administrator before calling our technical support department.

RightFAX Technical Support

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6:00 a.m. to 6:00 p.m. MST, Saturday

Configuring DOCS Open

Before installing the Document Management Connector on each RightFAX client computer, you must first configure DOCS Open to recognize and support RightFAX document types:

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

Type SENTFAX in the Type ID field

Type Sent Faxes in the Description field

Document Types

Type ID: SENTFAX Full Text Index

Description: Sent Faxes

Default Storage Type

Archive Delete Keep Optical

Retention Days:

Maximum Versions: 99

Maximum Sub-Versions: 26

Versions to Keep:

Keep Criteria

By Last Edit By Versions

Second Retention Storage Type

Archive Delete Keep

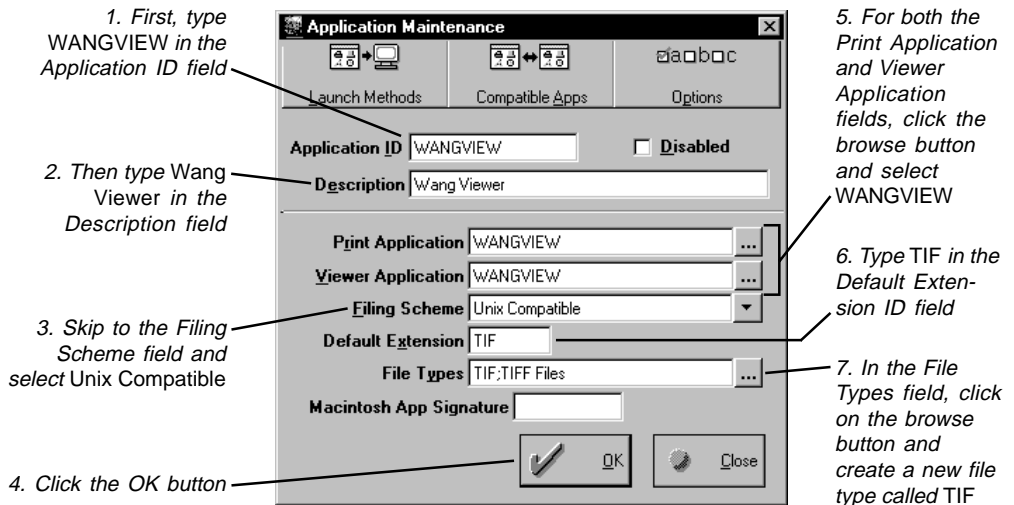
Second Retention Days:

Target Document Server:

OK Cancel

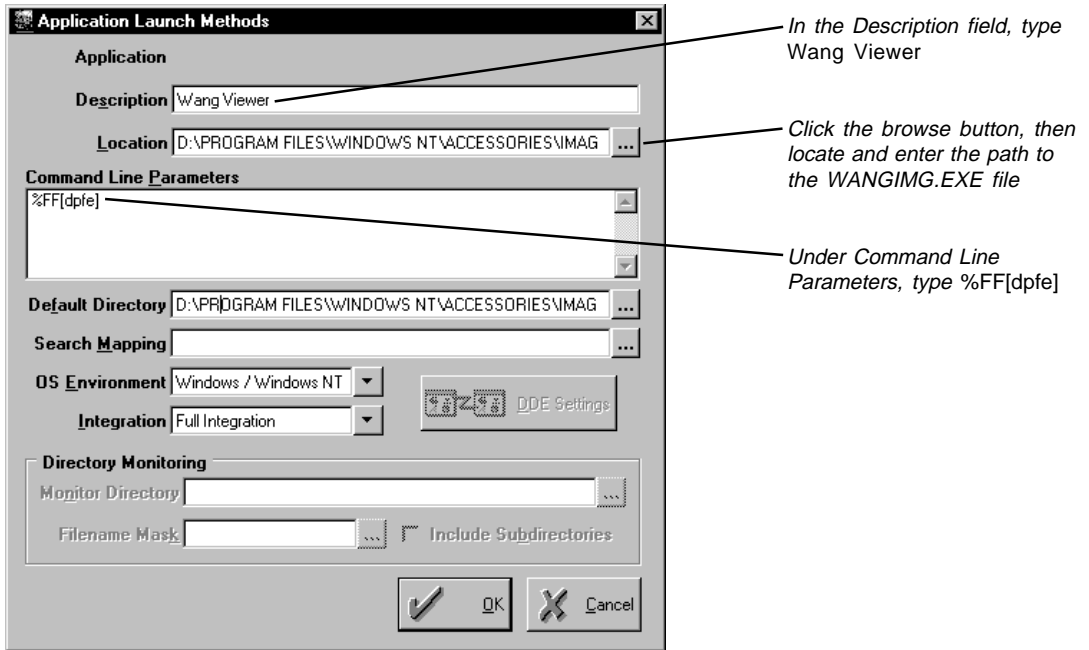
3. In the **Type ID** field, type **SENTFAX**. In the **Description** field, type **Sent Faxes** (as in the example above). Other fields should be set to match other standard document types. Click **OK** to return to the **Document Types Select** dialog.
4. Once again, click on the **New** button to open the **Document Types** dialog.

5. In the **Type ID** field, type **RECVFAX**. In the **Description** field, type **Received Faxes**. As with the SENTFAX document type, the other fields should be set to match your standard document types. Click **OK** to return to the **Document Types Select** dialog. Click on the **Close** button to return to Library Maintenance.
6. Double-click on the **Applications** icon to open the **Application Maintenance Select** dialog. Click the **New** button to open the **Application Maintenance** dialog:



7. In the **Application ID** field, type **WANGVIEW**. In the **Description** field, type **wang viewer**. Select **Unix Compatible** from the **Filing Scheme** list box and click the **OK** button. (The **Application Maintenance** dialog should *not* close.)
8. For both the **Print Application** and **Viewer Application** fields, click the browse button to the right of the field and select **WANGVIEW**. In the **Default Extension** field, type **TIF**. In the **File Types** field, click on the browse button and create a new file type called **TIF**.

9. When all the fields have been completed, click on the **Launch Methods** button in the top left of the **Application Maintenance** dialog. This opens the **Application Launch Methods** dialog:



10. In the **Description** field, type **Wang Viewer**. Click the browse button to the right of the **Location** field to locate and enter the path to the WANGIMG.EXE file (usually located in the \PROGRAM_FILES\WINDOWS_NT\ACCESSORIES\IMAGEVUE directory).
11. Under **Command Line Parameters**, type **%FF[dpfe]**.
12. Click **OK** to close the dialog. To complete the DOCS Open configuration, click each open dialog's **Close** button and exit the Library Maintenance program.

These instructions set up the Wang Viewer as your fax viewing application in DOCS Open. If you have set up and want to use other fax viewing applications in DOCS Open such as DOCS Image or Mailroom, you can specify the name of the application you want to use in the PCDOCS.INI file (described in [Appendix A](#))

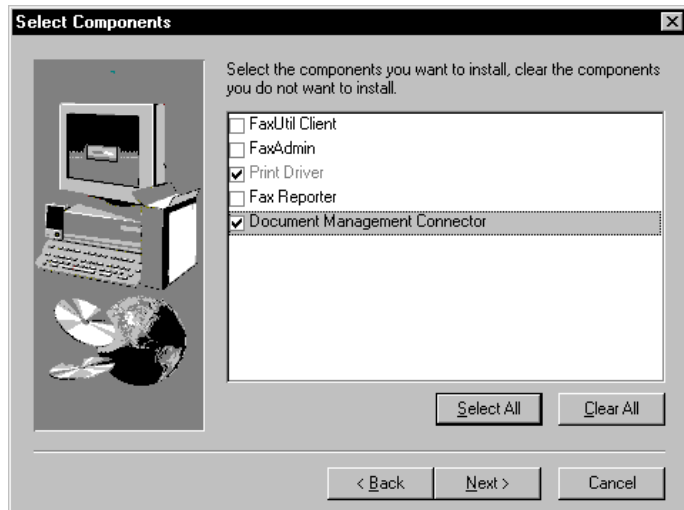
Installing the Document Management Connector

After DOCS Open has been configured to recognize RightFAX fax documents, follow these steps on each RightFAX client computer to install the Document Management Connector:

Note: You must have RightFAX server and client software versions 5.2 installed prior to installing this connector. *Do not install the Document Management Connector if your RightFAX version is prior to 5.2.*

1. Insert the RightFAX Document Management Connector CD-ROM into the RightFAX *server* and run **SETUP.EXE** on the CD. Follow the instructions on screen to complete the installation on the RightFAX server.
2. On the first RightFAX *client* computer, go to the RIGHTFAX\CLIENT\WINNT directory on the RightFAX server and run **SETUP.EXE**.
3. Follow the prompts to the **Select Components** screen:

Check the Document Management Connector option. The Print Driver option must be installed as well and is automatically checked



Check the **Document Management Connector** option. Because installing this connector requires that you also install new print drivers, the **Print Driver** option is automatically checked when you select **Document Management Connector**. Check any additional components you want to install, then click **Next**.

Note: If you have already installed the FaxUtil client or any other components, choosing to reinstall those components is unnecessary, but will not cause any harm. If you do not check a component that has already been installed, that component will remain installed and unchanged.

4. A dialog will prompt you to select a fax viewer type. Select **WangViewer** to use the default Windows NT or Windows 95 client fax image viewing software. Select **Simplify MailRoom Viewer** to use the MailRoom fax image viewing software (purchased separately). When you have selected a viewer type, click **Next**.
5. The Setup program will install all the necessary files to integrate this RightFAX client with DOCS Open. When the Setup is complete, click on **Finish** to exit and restart the computer. Repeat steps 2 through 5 on each RightFAX client computer that will integrate with DOCS Open.



Working with Fax Documents

In this chapter:

- Importing Fax Documents into DOCS Open
- Sending Faxes from DOCS Open

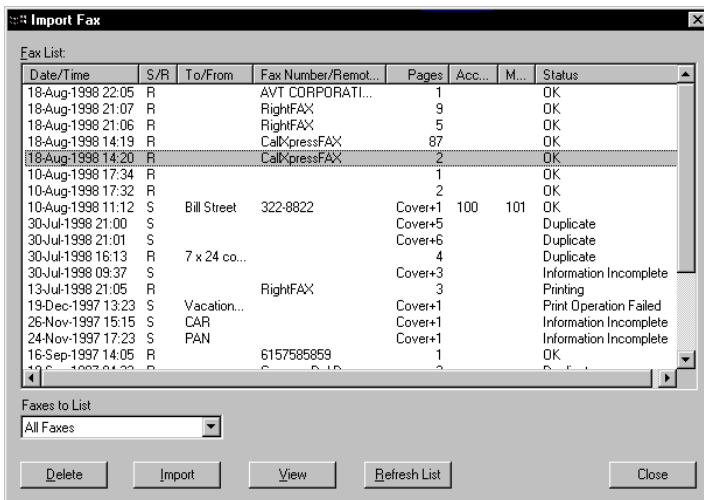
One of the main features of the Document Management connector is to let you import fax documents, both sent and received, into DOCS Open so they can be tracked and managed as conveniently as your other documents. The connector also lets you view and delete faxes directly from your RightFAX fax mailbox.

Importing Fax Documents into DOCS Open

Follow these steps to import sent or received faxes into DOCS Open:

1. Once the Document Management connector has been installed on your client workstation, run DOCS Open.
2. From the main screen, select **Import Fax** from the **Document** menu. This opens the **Import Fax** dialog:

You can select multiple files to delete by pressing [Shift] and using the arrow keys. Deleting a file from the Import Fax dialog removes the fax from your RightFAX mailbox



This dialog lists faxes in the your RightFAX fax mailbox. Select the type of faxes to display (unviewed received faxes, all received faxes, all sent faxes, or all faxes) in the **Faxes to List** list box.

You can easily view or delete any fax from the list by highlighting the fax and clicking the **View** or **Delete** buttons.

- Click on a fax to highlight it, then click on the **Import** button. This opens the **Document Profile** dialog:

Document Profile - New Document

Document Name: Fax from remote ID RightFAX (ID:BDS35D990F02)

Author: BDS

Client: 100

Matter: 001

Document Type: RECVFAX

Description: August 25 deposition

Access Control
 Secure Document **Edit**

Application: WANGVIEW
Wang Viewer

Retention Schedule
Type: Archive
Retention Days: 0

History
Created: 8/19/98 BDS
Edited: 8/19/98 BDS

Enable Content Searching **Billable**

Status:

OK **Cancel**

In DOCS Open, each Document Name must be unique. For this reason, the Document Management connector automatically includes each fax's unique RightFAX ID as part of the Document Name

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

- Complete any additional necessary fields, such as **Client** and **Matter** codes, then click **OK** to import the fax.

Sending Faxes from DOCS Open

Another key feature of the Document Management connector is the ability to easily fax a document directly from DOCS Open and record the fax event in the document's history.

In DOCS Open, locate and highlight the document to fax. Select **Fax** from the **Document** menu, or right-click on the fax document and click on **Fax**. DOCS Open will automatically launch the appropriate application for the document and print it to the RightFAX queue. This opens the **Fax Information** dialog:

You must complete all italicized fields in order to send the fax. Non-italicized fields are optional

If the document you are faxing has been assigned billing codes, those codes are automatically entered here

Faxing a document directly from DOCS Open changes the default printer setting for that document's native application to the RightFAX Fax Printer

You must complete all italicized fields in order to send the fax. Non-italicized fields are optional.

When you have entered the necessary information, click on **Send** to send the fax. For more information on using the **Fax Information** dialog, please refer to your RightFAX User's Guide.

Faxing from Within Native Applications

If you have opened a document from DOCS Open and are working within that document's native application, you can easily fax the document from there. To fax from within a native application, print the document and select **RightFAX Fax Printer** as the printer. The Fax Information dialog will automatically fill in any billing codes and other information as though you faxed directly from DOCS Open.

Automated Billing Codes

If the document you are faxing contains billing codes, those codes are automatically entered in the **Account** and **Matter** fields under **Billing Codes**. If you manually change either of these billing codes, the connector will query DOCS Open and confirm that the new billing code(s) are valid. If you enter an invalid billing code, the connector will display the message:

Invalid Client/Matter Code

Click **OK** to close the message window and enter new billing codes.

Document History

Whenever you fax a document from within DOCS Open, the entry:

Faxed via RightFAX

is automatically added to that document's history in the Type column.



Retrieving DOCS Open Billing Codes

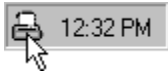
In this chapter:

- RightFAX ODBC Configuration
- Querying DOCS Open Billing Codes

The Document Management connector lets you integrate billing codes from DOCS Open for use in all of your outbound faxes. Each client workstation must be configured individually to access these billing codes.

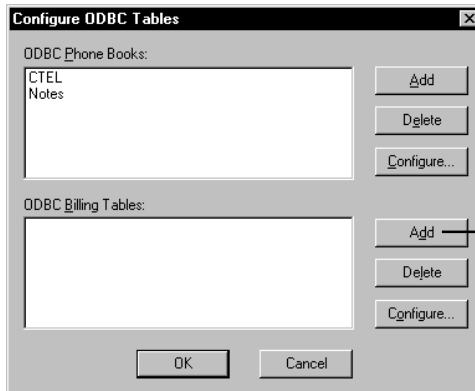
RightFAX ODBC Configuration

Follow these steps to configure RightFAX to use an ODBC billing code source:



Click on the RightFAX tray icon and select ODBC Configuration

1. Click on the RightFAX tray icon in the corner of your taskbar. From the menu, select **ODBC Configuration**. This opens the **Configure ODBC Tables** dialog:



Click the Add button

- Click on the **Add** button under **ODBC Billing Tables**. This opens the **Configure ODBC Billing Table** dialog:

Configure ODBC Billing Table

Billing Table Name:

ODBC Source: ...

SELECT...

Billing Info #1 Field:

Billing Info #2 Field:

Description #1 Field:

Description #2 Field:

FROM...

WHERE...

ORDER BY...

ODBC User ID: Use RightFAX User ID

ODBC User Password: Use RightFAX Password

Records to load at once:

SQL Cursor Type:

Type a descriptive name for the billing codes table

Click the browse button and select the DOCS Open ODBC driver

If the system administrator configured the DOCS Open database using the default record names, these fields can be filled in exactly as shown in the example above

Fill in the ID and password necessary to access the ODBC database. If the ID and password match those used to log into RightFAX FaxUtil, you may check those boxes instead

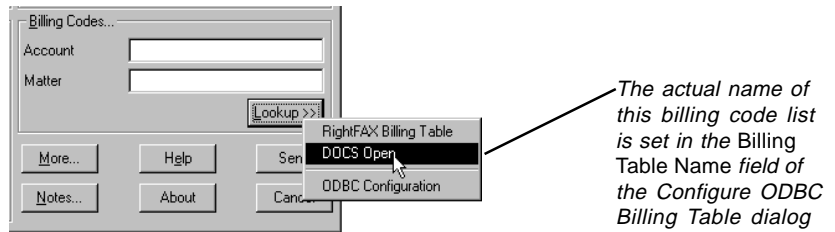
- In the **Billing Table Name** field, type a descriptive name for this billing codes table.
- Click the browse button to the right of the **ODBC Source** field and select the DOCS Open ODBC driver.
- Next, you must relate the fields of the DOCS Open database to the standard RightFAX billing code fields. This is done with a simple SQL query statement. If the system administrator configured the DOCS Open database using the default settings, these fields can be filled in exactly as shown in the example above. Otherwise, use the examples above but substitute actual field names.
- In the **ODBC User ID** and **ODBC User Password** fields, fill in the ID and password necessary to access the database. If the ID and password match those used to log into RightFAX FaxUtil, you may check those 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** field.
- 8. Set **SQL Cursor Type** to **Dynamic**. When you have completed the dialog, click **OK**.

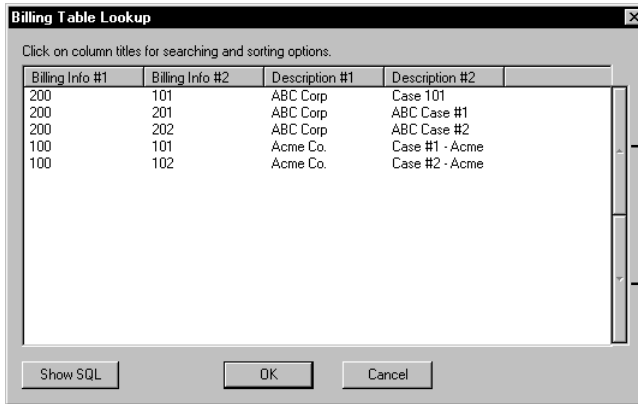
Querying DOCS Open Billing Codes

Once you have configured the necessary ODBC information, you can access DOCS Open billing codes when sending faxes.

From the **Fax Information** dialog, click on the **Lookup** button. A window asks you to select RightFAX or DOCS Open billing codes:



Select DOCS Open. This opens a dialog listing DOCS Open billing codes:



If only a partial list of billing codes is displayed, click on these arrows to view the next or previous list

If you limited the number of records displayed at one time (in the **Records to Load at Once** field on the **Configure ODBC Billing Table** dialog, earlier in this chapter), you will see only the specified number of records (or less). To view the previous or next batch of codes, click on the up and down arrows on the right side of the list.

Highlight the billing code information you want and click **OK** to enter it in the Fax Information dialog.



Appendix A: Customizing the PCDOCS.INI File

PCDOCS.INI

When you install the RightFAX 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.

```
[RightFAX]
Application=WANGVIEW
```

This setting specifies the name of the application to use for viewing faxes from DOCS Open. If you have set up and want to use other fax viewing applications in DOCS Open such as DOCS Image or Mailroom, replace **WANGVIEW** with the name of the application you want.

```
[RightFAX]
SentDocType=SentFax
RecvDocType=RecvFax
```

During the installation of the Document Management Connector, you specified the DOCS Open document type names for sent and received faxes as **SENTFAX** and **RECVFAX**. The names of these document types can be changed here.

```
[RightFAX]
BILLINFO1=MATTER.CLIENT_ID.CLIENT_ID
BILLINFO2=MATTER.MATTER_ID
```

The Document Management Connector associates RightFAX's **Billing Code 1** with the DOCS Open **Client** field, and RightFAX's **Billing Code 2** with the DOCS Open **Matter** field. This setting tells RightFAX the names of these fields in DOCS Open.

```
[EventsApi]
dll1=d:\winnt\system32\spool\prtprocs\w32x86\rfdocs.dll
```

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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