

RightFAX[®]

InterAction Integration Guide

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Table of Contents

- Chapter 1: Introduction 4**
 - Using This Guide and Other Learning Tools4
 - Document Conventions7
 - Technical Support8

- Chapter 2: Installing the RightFAX InterAction Integration Software ... 9**
 - Installing the Integration Software9

- Chapter 3: Creating and Sending Faxes from InterAction 10**
 - Reviewing Fax Records in the Contact Activity Log 12

- Index 14**

Chapter 1: Introduction

RightFAX's integration with Interface Software's *InterAction* contact management system lets you send faxes to contacts directly from within the *InterAction* client. When the integration software is installed, *InterAction* users can select one or more contacts, then select a custom installed option to create a new fax. This automatically runs RightFAX's FaxUtil client software, creates a new fax, and addresses the fax to the selected contact(s). Users can then write notes to include on the fax cover sheet, add file attachments or library documents, and customize their other fax options exactly the same as they would when creating a new fax in FaxUtil. After the fax is sent, the user is automatically returned to the *InterAction* client.

In addition, every time a fax is sent to a contact from within *InterAction*, a record is stored in that contact's activity log. Any fax that hasn't been deleted from the user's fax mailbox can be viewed by selecting it in the activity log.

This integration software requires:

- RightFAX server v7.0 SP1 or higher
- RightFAX FaxUtil v7.0 SP1 or higher installed on the client workstations
- *InterAction* v4.01 or higher for the server and all client workstations

Using This Guide and Other Learning Tools

The *RightFAX InterAction Integration Guide* is designed for use by *InterAction* clients and the RightFAX and/or *InterAction* administrators who will be installing and configuring the integration software on *InterAction* client machines. Specific instructions for operating *InterAction* are provided with the *InterAction* software package. This guide assumes that you have a basic working knowledge of RightFAX and *InterAction* as well as your computer network and the conventions used in most Windows-based software applications.

RightFAX also provides several additional sources of information, each designed so that you can get the most out of your RightFAX software quickly and easily.

Resources for the RightFAX Administrator

RightFAX Administrator's Guide. This guide contains detailed instructions on installing and configuring RightFAX for both the server and client workstations.

This guide is specifically designed for RightFAX administrators and includes the technical information necessary to manage the fax server.

RightFAX Docs-on-Demand and TeleConnect Guide. This guide is designed for use by RightFAX administrators who will be installing and configuring the Docs-on-Demand™ and/or TeleConnect™ modules. This guide provides information on installing, using, managing, and integrating the RightFAX Docs-on-Demand and TeleConnect modules with your RightFAX software.

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

RightFAX Gateway for Microsoft Exchange, Gateway for Lotus Notes, and Web Client Guide. This guide is included when you purchase RightFAX Enterprise Suite, the Microsoft® Exchange or Lotus® Notes® Gateway™, or the Web Client™ optional module. This guide provides information on installing, using, managing, and integrating the RightFAX E-mail Gateways and RightFAX Web Client module with your RightFAX software.

RightFAX OCR and PDF Modules Guide. This guide is included when you purchase RightFAX Enterprise Suite™, either of the OCR modules, or the PDF module. This guide provides information on installing, using, managing, and integrating these modules with your RightFAX system.

RightFAX SNMP Alerting Module Guide. This guide is designed for use by RightFAX administrators who will be installing, configuring, and using the RightFAX SNMP Alerting software for realtime monitoring of the RightFAX server via SNMP-capable network monitoring applications.

Resources for the Production Environment Administrator

RightFAX Connector for SAP R/3 Guide. This guide is designed for use by RightFAX and SAP R/3 administrators who will be installing and configuring the SAP Connector, and SAP clients who will be sending and receiving faxes via the Connector.

RightFAX Filter for Oracle Guide. This guide is designed for RightFAX and Oracle administrators who will be installing and configuring the RightFAX Filter for Oracle for the Production Fax Environment, and for the Oracle clients who will be sending faxes via the Filter.

RightFAX InternetLink Module Guide. This guide is designed for RightFAX administrators who will be installing and configuring the RightFAX InternetLink module for the Production Fax Environment. This guide includes all the technical

information necessary to operate the InternetLink module for delivery of production faxes via the Internet.

RightFAX Production Environment Guide. This guide is designed for use by RightFAX administrators who will be installing and configuring the Production Fax module onto the RightFAX server for advanced automation of their business fax processes.

RightFAX Professional Services Group. The RightFAX Professional Services Group provides hands-on expertise in the installation, setup, and customization of the RightFAX Production Environment. The Professional Services Group will assess your requirements and work either on-site or remotely, to ensure compliance with your organization's pre-determined project scope, defined boundaries, timelines, benchmarks, and closure expectations.

Resources for RightFAX Users

Because your RightFAX server(s) may support dozens, hundreds, or even thousands of fax users, RightFAX has designed its end-user documentation to be thorough, easy-to-use, and easily accessible. All the information your fax users need to operate their client applications is included in the online help installed with the application. For users who prefer to reference written materials, RightFAX also provides Quick Reference Cards for all its major client applications. These useful cards are compact and can be easily distributed throughout even the largest organizations.

Online Help. RightFAX 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 Enterprise Fax Manager window. Online help lets you scan for help by topic, or search for key words and terms. In addition, many RightFAX dialogs include a "What's This?" Help button **[?]** in the top right. Click this button, then click on any field in the dialog for a description of that specific field.

Quick Reference Cards. These cards give you quick and easy access to the most common fax management features of the FaxUtil, Microsoft Exchange, Lotus Notes, and Web Client fax client applications.

RightFAX Training

Everyone knows that training plays a key role in the successful implementation of information technology. RightFAX training gives you the skills to optimize your RightFAX solution. Our comprehensive technical, administrative and user training programs produce full utilization and understanding of RightFAX products. Regular classes are held at the state-of-the-art RightFAX Training Center in Tucson, Arizona throughout the year, or you can choose the convenience of training at your own

location or at various regional locations. Customized training is also available to meet your specific needs. Training materials and computer-based training tools are also available. For more information on RightFAX training, please visit our Web site at www.rightfax.com/training, or call us at (520) 320-7098 and let us help you develop a customized training plan for your organization.

Document Conventions

Fonts and icons are used consistently throughout this guide to make it as easy as possible to read and understand.

Italics are used whenever referring to another chapter or section in this guide, or when referring to other user guides.

Boldface is used to indicate a dialog or menu name, a field or option listed on a dialog, or a menu option.

“Quotes” are used to indicate the name of an item in a list box or pull-down menu on a dialog.

Courier font is used to indicate text entered in a dialog field or on a command line, or written in an ASCII or other text file. This font is also used to set examples off from the surrounding text. If the text contains variables (e.g., a command line with variable parameters), the variables are ***Italicized*** and then described in the subsequent paragraph.

Directory and file names are written in CAPITALS to set them apart from the surrounding text. Directory names are always preceded with a backslash character (\) and file names always include both the name and extension.



Special notes, warnings, and tips like this one are displayed throughout this guide. Each is preceded by an icon indicating the importance of the information.

Special notes, tips, and warnings appear throughout this guide and always appear in the left margin like the example here. An icon at the beginning of the paragraph indicates its purpose. A lower-case “i” indicates a note or other information that may only be important under certain circumstances. A question mark indicates a useful tip or troubleshooting information. An exclamation point indicates a warning. Warnings should always be read carefully before proceeding.

Technical Support

Your *Customer Support Guide* 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 technical questions, please contact your organization’s RightFAX administrator or network administrator before calling our technical support department.

RightFAX Technical Support:

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Suite 200
Tucson, Arizona 85715 USA

Voice: (520) 320-7070
Fax: (520) 321-7461
Web: www.rightfax.com
E-mail: tech@rightfax.com

5:00 a.m. to 6:00 p.m. MST, Monday through Friday
6:00 a.m. to 6:00 p.m. MST, Saturday

Support Plan Sales & Administration:

(520) 320-7000



Chapter 2: Installing the RightFAX InterAction Integration Software

The RightFAX InterAction integration software is installed on each InterAction client machine from the RightFAX server. Because the integration uses RightFAX's fax client software *FaxUtil* as the engine for creating and sending faxes to the RightFAX server, you must install FaxUtil to each client workstation before installing the integration software.

For more information on installing FaxUtil, refer to your *RightFAX Administrators Guide*.

Installing the Integration Software

Before installing this software, make sure that your organization's RightFAX server is v7.0 SP1 or higher and that all client machines and the InterAction server are running InterAction v4.01 or higher.

To install the integration software:

1. On the InterAction workstation, open a view of the `\RIGHTFAX\CLIENT\INTERACTION` directory on the RightFAX server machine and run SETUPEXE.
2. Click through any introductory and licensing screens. You may have some additional options or settings depending on the workstation's operating system.
3. The Setup program will begin copying the necessary files. When all the files have been copied, click **Finish** to complete the setup.



Chapter 3: Creating and Sending Faxes from InterAction

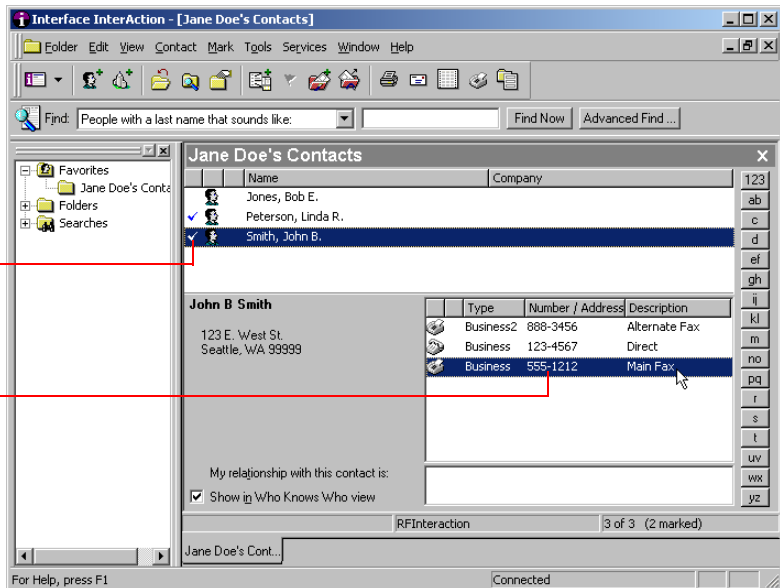
The RightFAX InterAction integration lets you easily send faxes to one or more contacts directly from your InterAction software. All faxes sent from InterAction are forwarded to the fax server for processing and transmission. Whenever a fax is sent via the RightFAX server, RightFAX also automatically creates a new activity log entry for each contact who received the fax. This records the time and date of each fax sent, and also links to the fax image so sent faxes can be reviewed at any time.

To create and send a fax to one or multiple contacts:

1. In InterAction, open the folder containing the contacts who will receive the fax.
2. If you are sending the fax to one contact only, select the desired contact so that the address and other contact information is displayed in the summary pane (below the list of contact names). If you are sending one fax to multiple contacts, click in the left column of each desired contact so that a check mark appears next to the contact type icon.

If sending a fax to multiple contacts, check each of the desired contacts here, then select **Send a Fax to Marked Contacts** from the **Services** menu

If sending a fax to one contact only, highlight the contact, then double-click the fax number here

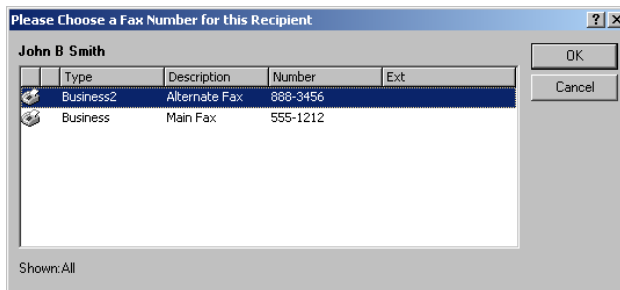


- 3. If sending a fax to one contact only, double-click the contact’s fax number in the summary pane. If you have checked multiple contacts to receive the fax, select **Send a Fax to the Marked Contacts** from the **Services** menu.

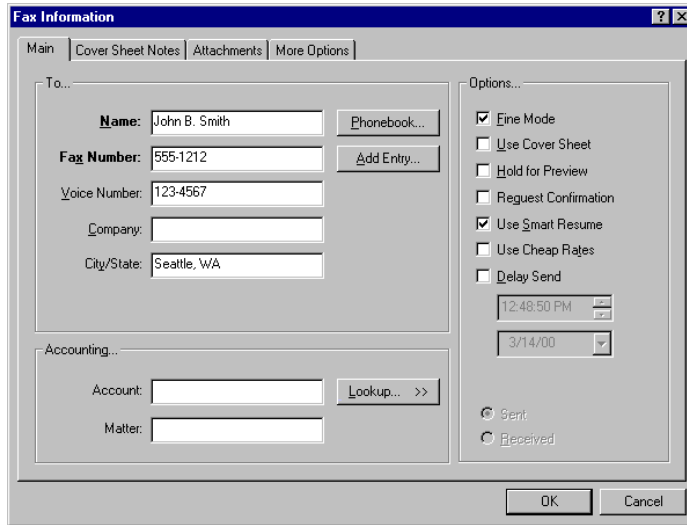
 The RightFAX InterAction integration automatically adds the **Send a Fax to Marked Contacts** option to the **Services** menu, but there may be other options on this menu not shown in this example.



- 4. The integration software will automatically launch the FaxUtil program which lets you create and send the fax. If you see the message “Please open a valid RightFAX server,” click the **OK** button to close the message box, then select **Open Server** from the **File** menu. Enter the name of your RightFAX server in the **Server Name** field (you should not need to change the setting in the **Protocol** field) and click **OK**.
- 5. Depending on your RightFAX configuration, FaxUtil may also require you to supply login information before it will run. If prompted for a user ID and password, enter your RightFAX user ID and password (this may be different from your network login information) and click the **OK** button.
- 6. If you are sending the fax to multiple contacts, some of those contacts may have more than one fax number listed (for example, primary and alternate fax numbers). For each of these contacts, a dialog will appear asking you to select which fax number to use. Highlight the fax number you want and click **OK**.



- 7. Once FaxUtil launches, it automatically displays the **Fax Information** dialog with all the contact’s addressing information from InterAction already filled in:



If you selected multiple contacts to receive the fax, the number of contacts will be displayed in the **Name** field and all other fields will remain blank.

- 8. Create your fax by adding cover sheet notes, attaching files and library documents, and completing the other fax transmission options on this dialog. For a definition of each field on this dialog, click the “What’s This” help button **[?]** in the top right, then click on the field or option you want defined. For more comprehensive help on how to send faxes from FaxUtil, refer to the *FaxUtil Quick Reference Card* or the FaxUtil online help.
- 9. When you have completed the **Fax Information** dialog with the fax attachments and options you want, click **OK** to send the fax.

Reviewing Fax Records in the Contact Activity Log

Every time you send a fax to a contact, a record of the fax is stored in that contact’s activity log. Any fax that hasn’t been deleted from the user’s fax mailbox can be viewed at any time by selecting it in the activity log.

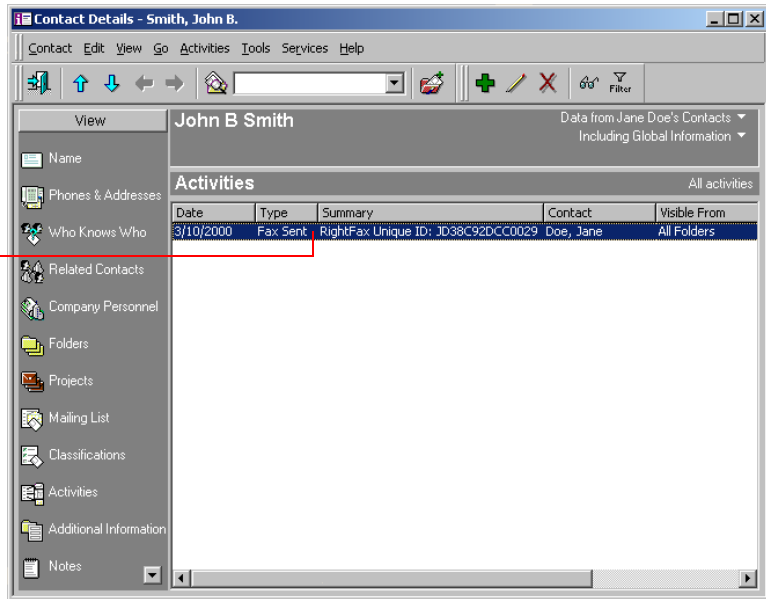


An entry will be made to the activity log even when a fax does not transmit successfully (e.g., the receiving phone line is busy). For InterAction users to receive notifications about unsent faxes, the RightFAX administrator must set up an alternate fax notification system using (described in the *RightFAX Administrator's Guide*).

To view a fax listed in the activity log, double-click anywhere in the activity entry

To review the faxes that have been sent to a contact:

1. In InterAction, double-click on the contact whose fax history you want to review. This opens the **Contact Details** screen.
2. In the **View List**, on the left side of the screen, click **Activities**. This opens the contact's activity log:



To be able to view a fax from inside the InterAction activity log, the fax image must be saved in your FaxUtil mailbox. If the fax image has been deleted or moved to another folder or mailbox, FaxUtil will display an error message and automatically return you to the InterAction activity log.

3. Double-click anywhere in the activity entry. This opens your FaxUtil mailbox with the specified fax highlighted.
4. To view the fax, select **View** from the **Fax** menu. This opens the FaxUtil fax viewer. For information on using the fax viewer, press [F1] to open the viewer's online help.



Index

A

activity log, InterAction 12

C

Contact Details screen 13
conventions 7
create fax in InterAction 10

D

document conventions 7

F

Fax Information dialog 12
fax records in the InterAction activity log 12
FaxUtil fax viewer 13

I

install integration module 9
install integration software 9
integration software
 installing 9
 introduction 4
 requirements 4
InterAction activity log 12
InterAction Contact Details screen 13
InterAction, creating a new fax 10
InterAction, Services menu 11
introduction 4

R

requirements 4

RightFAX

technical support 8
training 6

S

Send a Fax to the Marked Contacts menu option 11
send fax from InterAction 10
Services menu in InterAction 11
SETUP.EXE 9
support, technical 8

T

technical support 8
training 6

V

view faxes in the contact activity log 13