

# ***RightFAX***<sup>®</sup>

**v7.0 WinFax PRO Integration Module Guide**

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# Chapter 1: Introduction

The RightFAX/WinFax PRO Integration Module seamlessly 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 RightFAX/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 v6.0 SP1 or higher
- WinFax PRO v9.02 or higher

## Using This Guide and Other Learning Tools

The *RightFAX WinFax PRO Integration Module Guide* is designed for use by fax clients and administrators who will be installing and configuring the RightFAX/WinFax PRO Integration Module on WinFax client machines. Specific instructions for operating the WinFax PRO software are provided with the WinFax PRO software. This guide assumes that you have a basic working knowledge of RightFAX and WinFax PRO 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](http://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:**

6303 E. Tanque Verde

Suite 120

Tucson, Arizona 85715 USA

Voice: (520) 320-7070

Fax: (520) 321-7461

Web: [www.rightfax.com](http://www.rightfax.com)

E-mail: [tech@rightfax.com](mailto: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

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# Chapter 2: Installing and Configuring the Integration Module

The RightFAX WinFax PRO Integration Module is included with and automatically installed from the WinFax PRO v9.02c CD-ROM. If you have installed this version of WinFax PRO, you can skip the following installation instructions. If you have installed an earlier version of WinFax PRO v9.02, the RightFAX/WinFax PRO Integration Module can be downloaded for free from RightFAX's Web site at [www.rightfax.com/support/download.htm](http://www.rightfax.com/support/download.htm). It is downloaded as a single SETUP.EXE file. The module must then be installed on each individual WinFax client computer.

Because WinFAX PRO is not designed to validate RightFAX user accounts using NT authentication, the NT authentication option should not be enabled for any RightFAX user with the WinFax PRO client integration installed.

## Installing the Integration Module

Before installing this module, make sure that your organization's RightFAX server is v6.0 SP1 or higher and that the fax client machine is running WinFax PRO v9.02 or higher.

### To install the integration module:

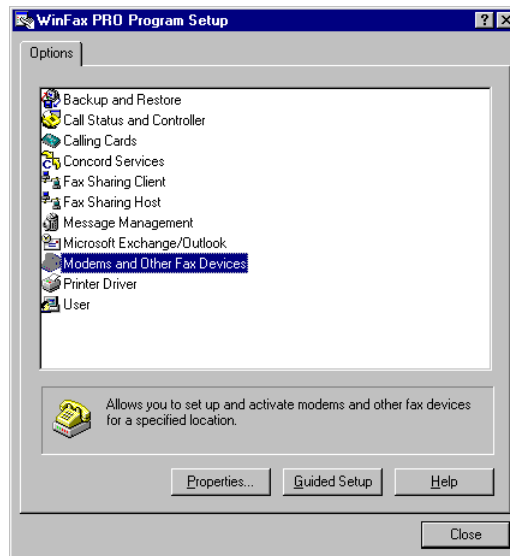
1. Execute the SETUP.EXE provided by RightFAX. This runs the RightFAX/WinFax PRO Integration Module Setup program.
2. Click **Next** to begin installing the necessary files.
3. When the Setup is complete, you will be prompted to run the WinFax Setup program in order to configure WinFax for RightFAX server integration. Check this option to automatically run the WinFax PRO Program Setup (see *Configuring the Integration Module*, page 10).

# Configuring the Integration Module

After you install the RightFAX/WinFax Integration Module, WinFax must be configured to recognize the RightFAX server and to identify you as a RightFAX client. These settings can be modified at any time by running the WinFax Program Setup.

## To Configure WinFax PRO for RightFAX Integration:

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



2. Double-click the **Modems and Other Fax Devices** option. This opens the **Modem and Other Fax Device Properties** dialog:



 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. Click the check box to the right of the **RightFAX Server Interface** option. A message will appear asking if you want to configure the RightFAX Server Interface. Click **Yes**. This starts the New Modem Type Install Wizard.
4. Click **Next** to start the Install Wizard. Enter the name of the RightFAX server to connect to and your RightFAX user ID. Click **Next**.
5. Enter the FaxUtil password for the specified user ID 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 which 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. Click **OK** and then **Close** to complete the configuration.

Once the RightFAX/WinFax PRO Integration is properly installed and configured, outgoing faxes generated in WinFax will be automatically 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 automatically forwarded to your WinFax mailbox. When the RightFAX server interface is initially set up, any unviewed faxes in your RightFAX FaxUtil mailbox will be automatically forwarded to WinFax.

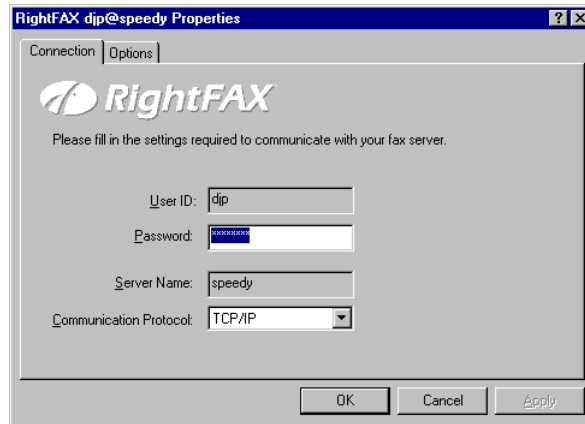
## Setting the RightFAX Server Interface Properties

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 **Setup** from the **Tools** menu, then select **Program Setup**. This opens the **WinFax Pro Program Setup** dialog.
2. Double-click the **Modems and Other Fax Devices** option. This opens the **Modem and Other Fax Device Properties** dialog.
3. Highlight the **RightFAX Server Interface** option and click the **Properties** button. This opens the **RightFAX Client Profile Properties** dialog. This dialog contains two tabs: **Connection** and **Options**.

## Setting the Connection Properties



The screenshot shows a dialog box titled "RightFAX djp@speedy Properties". It has two tabs: "Connection" (selected) and "Options". The dialog contains the RightFAX logo and the instruction: "Please fill in the settings required to communicate with your fax server." Below this are four input fields: "User ID:" with the value "djp", "Password:" with a masked password "\*\*\*\*\*", "Server Name:" with the value "speedy", and "Communication Protocol:" with a dropdown menu set to "TCP/IP". At the bottom right are three buttons: "OK", "Cancel", and "Apply".

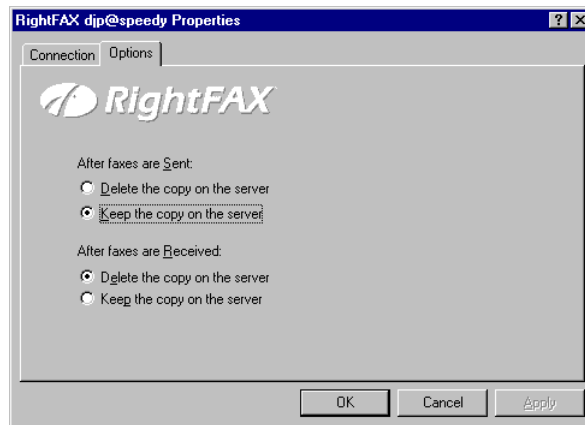
Because your RightFAX user ID and server name are used to define this as a WinFax fax device, those settings cannot be changed. To modify either of these settings you must add a new RightFAX server interface in WinFax (see *Configuring the Integration Module*, page 10).

**Password** is 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** sets 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:



These options let you specify what happens to sent and received fax images 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



The RightFAX connection icon in the Windows taskbar

When at a location where a RightFAX server is enabled as a fax device, WinFax PRO will automatically attempt to connect to the fax server each time you start the WinFax Message Manager or Controller. Whenever 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 "x".

To manually disconnect or reconnect to the RightFAX server, right-click the RightFAX connection icon. A 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 automatically be sent.

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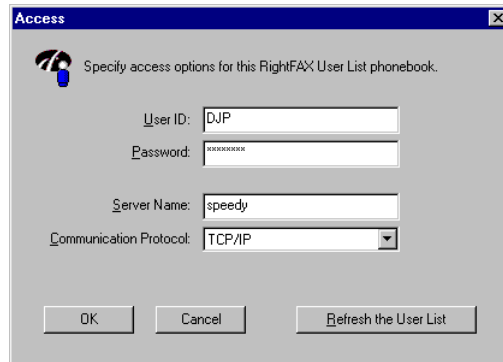
# Chapter 3: Sending Faxes From the Interaction Client

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 on “My Phonebook” in the Phonebook List and select **New Phonebook** from the 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 FaxUtil 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:



Access

Specify access options for this RightFAX User List phonebook.

User ID: DJP

Password: \*\*\*\*\*

Server Name: speedy

Communication Protocol: TCP/IP

OK Cancel Refresh the User List

8. Enter your RightFAX user ID, password, and 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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