



RightFax/WinFax PRO Integration
Module Guide

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Revision Number: 8.0 07/01

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Introduction

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

Using This Guide

The *RightFax WinFax PRO Integration Module Guide* is designed for use by RightFax users 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.

Document conventions

Notes and warnings in this guide provide instructions for special circumstances, side effects and product interactions, and important reminders.

- Notes include information that you may find useful but do not affect the integrity of your computer hardware, software, or data.
- Warnings always indicate that failure to proceed carefully may result in loss of data or damage to hardware or software. Always read and understand warnings before proceeding.

Windows path and folder names in this guide start with a backslash (\) character. Because most RightFax products let you customize the install location, paths are not presented as literal paths from the root directory. Instead, the install directory you selected at the time of installation is assumed to precede folder names where applicable.

Courier font is used in this guide to indicate text that you enter, command line text, or ASCII or other text. This font is also used to set examples off from the surrounding text. If the text contains variables (such as a command line with variable parameters), the variables are *italicized* and then described in the subsequent paragraph.

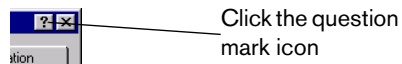
Other Resources for RightFax Users

Because your RightFax servers 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.

In addition to the user's guides, quick reference 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. These useful cards are compact and can be easily distributed throughout even the largest organizations.

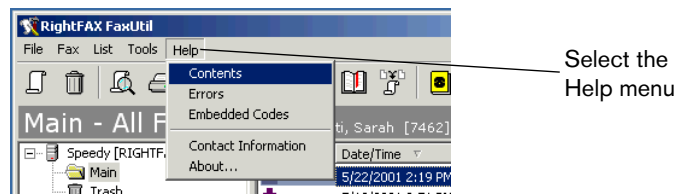
Getting help online

Most of the RightFax windows and dialog boxes include context-sensitive help. Typically, this help describes each field and option in a dialog box. This context-sensitive help can be launched from the question mark icon in the title bar of a dialog box.



- Click this icon, and then click any option on the dialog box to view its definition.
- Or, press F1 to view a definition.

Online help for tasks or conceptual topics also is available. View this help by selecting the **Help** menu. You can browse the help for a topic or use the index to look up key words and terms.



The RightFax user guides are provided as Adobe Acrobat® portable document format (.pdf) files. Browse your product CD or your RightFax server for the Docs folder. The user guides also are available at the RightFax Web site at www.rightfax.com/support.

The RightFax Web site offers the latest product information. Updated documentation, a searchable customer support knowledgebase, software downloads, and the latest product offerings are all online at www.rightfax.com.

Captaris Training Services

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 one of our regional locations. 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.

Captaris Implementation Services

Captaris Implementation Services offers a team of highly skilled engineers who are experts in the deployment, implementation, and integration of RightFax solutions. Implementation services include installation and configuration, upgrades, configuration review, and advanced integration services. Whether it's through remote dial-in, an on-site implementation, or a combination of both, the Implementation Services team can quickly integrate RightFax solutions with your existing applications.

Customer 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 questions of a technical nature, contact your organization's RightFax administrator or network administrator before calling the RightFax customer support department. On the RightFax Web site, a database of customer support knowledge contains a wealth of information on installing, configuring, and maintaining RightFax software.

RightFax Customer Support:

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Suite 120
6303 E. Tanque Verde
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 5:00 P.M. Pacific time, Monday through Friday

7:00 A.M. to 3:00 P.M. Pacific time, Saturday

Support Plan Sales and Administration: (520) 320-7000

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Chapter 1

Installing and Configuring the Integration Module

The RightFax/WinFax PRO Integration Module is included with WinFax PRO versions 9.02c and higher. 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 RightFax/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 RightFax/WinFax PRO Integration Module separately. The RightFax/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 your RightFax server CD-ROM in the \WinFax folder. The RightFax/WinFax PRO Integration Module must then be installed on each 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 7.0 SP1 or higher and that the fax client machine is running WinFax PRO 9.02 or higher.

To install the integration module

1. Execute the Setup.exe file provided by RightFax. This runs the RightFax/WinFax PRO Integration Module Setup wizard.
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 run the WinFax PRO Program Setup (described in the next section).

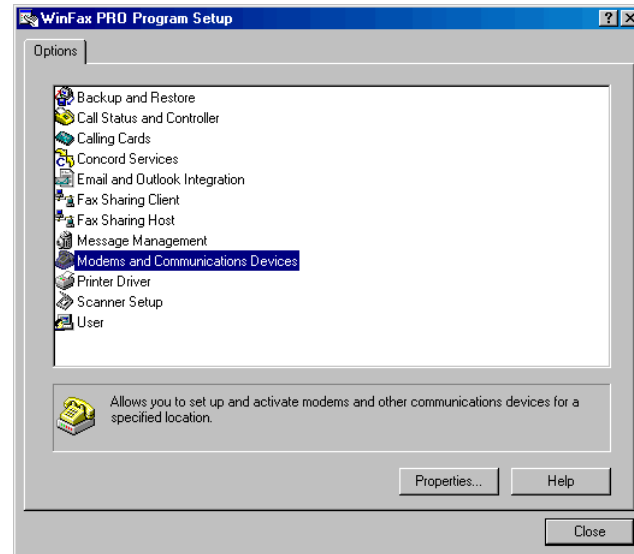
Configuring the Integration Module

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

To Configure WinFax PRO for RightFax Integration

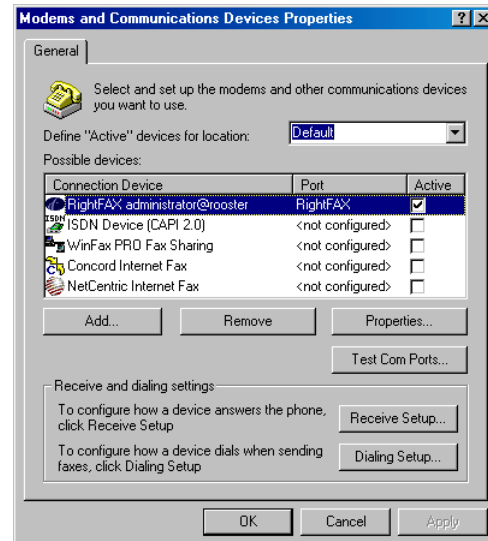
1. If you did not run the WinFax Program Setup during installation (described above), open the WinFax PRO Message Manager and select **Tools > Program Setup**. This opens the **WinFax PRO Program Setup** dialog box:

Figure 1.1 The WinFax PRO Program Setup Dialog Box



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

Figure 1.2 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 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 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 RightFax/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

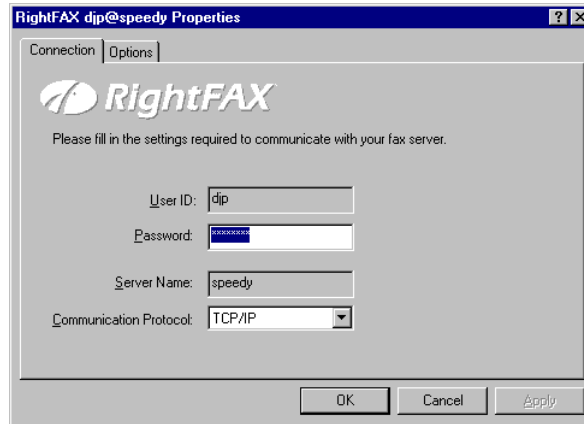
Each RightFax server installed as a fax device in WinFax PRO has several optional settings that let you customize how fax images are handled by the server.

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 Fax Devices** option. This opens the **Modem and Other Fax Device 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 1.3 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 Integration Module*, page 7).

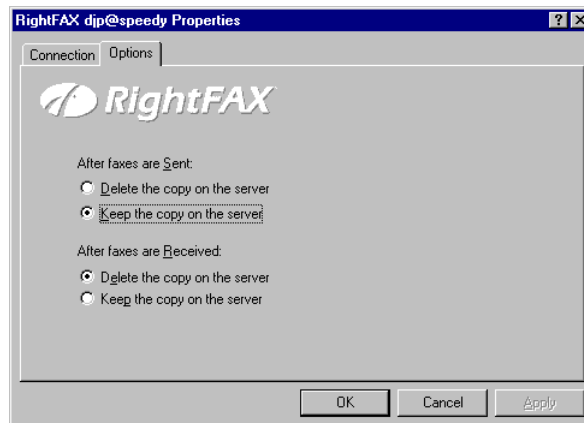
Password. Enter your FaxUtil password. This setting must match your password in RightFax in order to send and receive faxes. Changing the password here does not automatically set a new password in RightFax.

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.

Figure 1.4 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 **x**.

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.

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Chapter 2

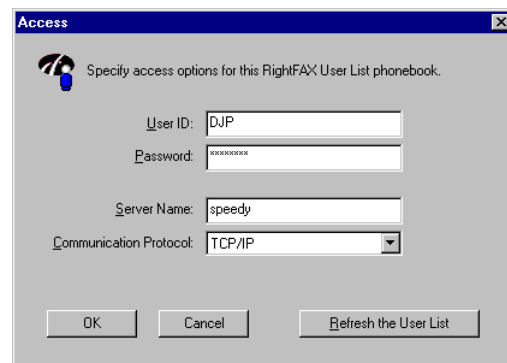
Creating RightFax Phonebooks in WinFax

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 2.1 Entering Your RightFax User Information



The screenshot shows a dialog box titled "Access" with a close button in the top right corner. The dialog contains the following fields and controls:

- A title bar with the text "Specify access options for this RightFAX User List phonebook." and a small icon of a telephone handset.
- A "User ID:" label followed by a text input field containing "DJP".
- A "Password:" label followed by a password input field with masked characters.
- A "Server Name:" label followed by a text input field containing "speedy".
- A "Communication Protocol:" label followed by a dropdown menu currently set to "TCP/IP".
- At the bottom, there are three buttons: "OK", "Cancel", and "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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