

RightFAX[®]

7.2 Document Management Connector Guide

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chapter

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Chapter 1: Overview of the RightFAX Document Management Connector

The RightFAX Document Management Connector lets you integrate your RightFAX client software with DOCS Open® by Hummingbird or iManage™ by NetRight Technologies. Both DOCS Open and iManage are client/server-based document management and tracking systems.

With the RightFAX Document Management Connector you can:

- ▶ Fax documents directly from DOCS Open or iManage via your 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, or iManage infoRite version 5.0 or higher.

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 RightFAX Document Management Connector.

This guide assumes that you have a significant working knowledge of RightFAX and either DOCS Open or iManage, as well as your computer and

the conventions used in most software applications for your workstation type.

In addition to this guide, RightFAX provides several additional sources for information on getting the most out of your RightFAX software.

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 Fax Administrator

RightFAX Connector for Baan IV C3 Guide. This guide contains an overview and instructions on configuring and working with the RightFAX Connector for Baan™ IV C3. It is designed for use by RightFAX and Baan administrators who will be installing and configuring the Baan Connector, and Baan clients who will be sending and receiving faxes via the Connector.

RightFAX Connector for Oracle E-Business Suite Guide. This guide is designed for use by RightFAX and Oracle administrators who will be installing and configuring the Connector. It assumes that you have a significant working knowledge of the RightFAX Integration Module and Oracle Purchasing 11i, as well as your hosts' operating systems and the conventions used by software applications for these operating system types.

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 Production Guide. This guide is designed for RightFAX and host application administrators who will be installing and configuring the Filter for Production and client applications that will be sending faxes to RightFAX via the Filter.

RightFAX InternetLink Module Guide. This guide is designed for RightFAX administrators who will be installing and configuring the InternetLink Module for the RightFAX Production Integration Module. This guide includes all the technical information necessary to operate the InternetLink module for delivery of production faxes via the Internet.

RightFAX Integration Module Guide. This guide is designed for use by RightFAX administrators who will be installing and configuring the Integration Module on the RightFAX server for advanced automation of their production fax processes.

AVT Consulting Services. AVT Consulting Services provides hands-on expertise in the installation, setup, and customization of the RightFAX software. They 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 technical support.

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
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

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chapter

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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.

To install the Document Management Connector for DOCS Open, your RightFAX server must be version 7.0 SP1 or higher. In addition, the RightFAX client (only the tray icon and print-to-fax driver are required) must be installed on each DOCS Open workstation. For information on installing the RightFAX client to each workstation, refer to the *RightFAX Administrator's Guide*. Do not install the Document Management Connector if your RightFAX server or client version is below v7.0 SP1.

Configuring the DOCS Open Server



These instructions set 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, specify the name of the application you want to use in the PCDOCS.INI file (see Appendix A: Customizing the PCDOCS.INI File on page 43).

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

To configure the DOCS Open server:

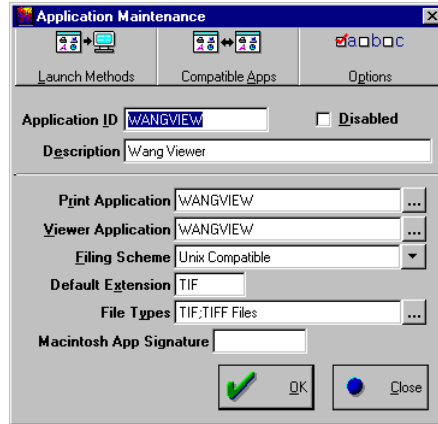
1. On the DOCS Open server, run the DOCS Open Administrator Library Maintenance program. Double-click the **Document Types** icon to open the **Document Types Select** dialog.

2. Click the **New** button to open the **Document Types** dialog:

The screenshot shows the 'Document Types' dialog box. The 'Type ID' field is set to 'SENTFAX' and the 'Full Text Index' checkbox is unchecked. The 'Description' field contains 'Sent Faxes'. Under 'Default Storage Type', the 'Archive' radio button is selected. The 'Retention Days' and 'Versions to Keep' fields are empty. 'Maximum Versions' is set to 99 and 'Maximum Sub-Versions' is set to 26. Under 'Keep Criteria', the 'By Last Edit' radio button is selected. The 'Second Retention Storage Type' section has 'Archive', 'Delete', and 'Keep' radio buttons, all of which are disabled. The 'Second Retention Days' field is empty. The 'Target Document Server' field is empty with a browse button. At the bottom, there are 'OK' and 'Cancel' buttons, with a green checkmark icon next to 'OK' and a red X icon next to 'Cancel'.

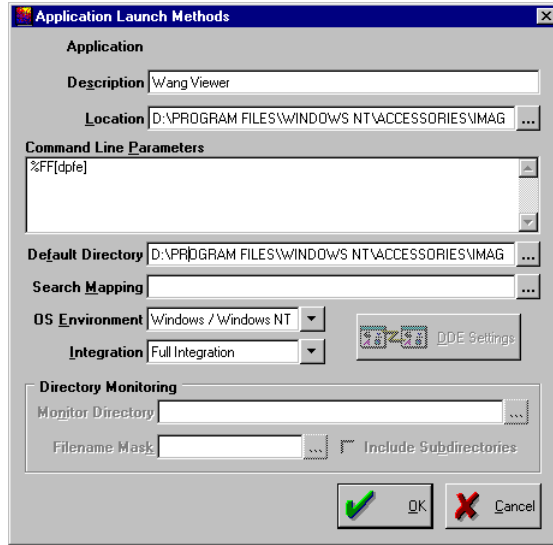
3. In the **Type ID** field, type "SENTFAX." In the **Description** field, type "Sent Faxes." The remaining fields on this dialog should be set to match those for other standard document types in DOCS Open. Click **OK** to return to the **Document Types Select** dialog.
4. Click the **New** button to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

6. Double-click 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 will 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 the browse button and create a new file type called “TIF.”

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



- In the **Description** field, type "Wang Viewer." Click the browse button next to the **Location** field to locate and enter the path to the WANGIMG.EXE file. (This is usually located in the \PROGRAM_FILES\WINDOWS_NT\ACCESSORIES\IMAGEVUE directory.)
- Under **Command Line Parameters** type "%FF[dpfe]".
- 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.

Installing the Document Management Connector

After the DOCS Open server has been configured to recognize RightFAX fax documents, the Document Management Connector itself must be installed to your RightFAX server. Then, once the Connector is installed, you must install the DOCS Open integration to each client workstation.

To install the Connector to your RightFAX server:

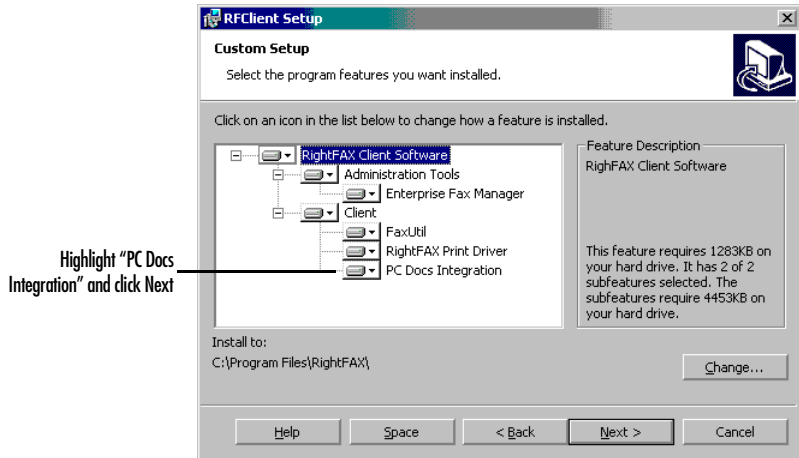
1. Insert the RightFAX Document Management Connector CD-ROM into the RightFAX server.
2. Run SETUP.EXE from the CD.
3. Follow the instructions on screen to complete the installation on the RightFAX server.

To install the DOCS Open integration to each client workstation:

After the Connector has been installed on the RightFAX server, you must perform this client installation on each DOCS Open client workstation that will integrate with RightFAX.

1. On the client workstation, open a view of the `\RIGHTFAX\CLIENT\WIN32` directory on the RightFAX server machine and run SETUP.EXE.
2. Click **Next** at the introductory screen.
3. Select **Modify** and click **Next**. A screen will appear asking you to specify the applications you want to install. The client applications are listed in categories. Click the [+] sign next to each category until the tree is fully

expanded. If the infoRite client is found on the workstation, the “PC Docs Integration” option will be listed under the “Client” heading:



4. Highlight the “PC Docs Integration” option and click **Next**, then click **Install** to begin. The Setup program will copy the PC Docs integration files onto the workstation. When the files have all been copied, click **Finish** to complete the install.

Running the RightFAX Client from a Network

If you are running the RightFAX client from a network and you will be running PC Docs from the network, complete the following steps:

1. On the RightFAX server, copy RFDPCS.DLL from
 \RIGHTFAX\CLIENT\WIN32 to
 \RIGHTFAX\CLIENT\WIN32\PROGRAM FILES\RIGHTFAX.

2. Edit PCDOCS.INI to include the following information:

```
[RightFAX]
```

```
APPLICATION=WANGVIEW
```

```
SentDocType=SentFax
```

```
RecvDocType=RecvFax
```

```
BillInfo1=MATTER.CLIENT_ID.CLIENT_ID
```

```
BillInfo2=MATTER.MATTER_ID
```

```
[EventsApi]
```

```
dll1=\\FAXSERVER\CLIENT\WIN32\PROGRAM  
FILES\RIGHTFAX\RFDOCS.DLL
```

Verify that FAXSERVER\CLIENT\WIN32\PROGRAM
FILES\RIGHTFAX\RFDOCS.DLL is shared.

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chapter

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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.

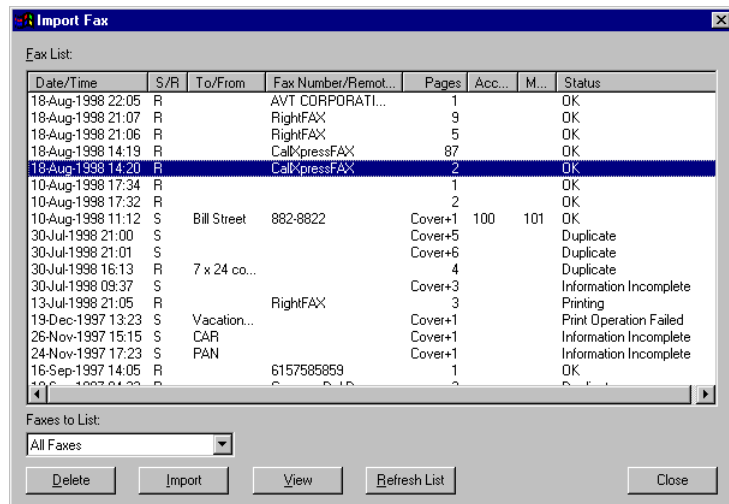
Importing Fax Documents Into DOCS Open

Once 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:

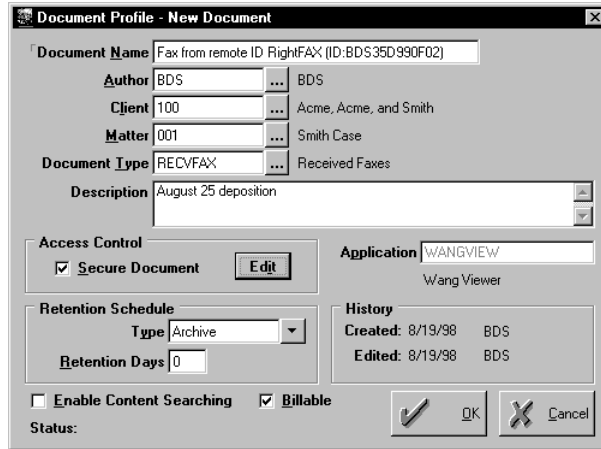
1. From the DOCS Open main screen, select **Import Fax** from the **Document** menu. This opens the **Import Fax** dialog. This dialog lists all the faxes in your RightFAX mailbox:

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



2. 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.
3. Highlight the fax to import then click the **Import** button. This opens the **Document Profile** dialog:

 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 field.



Document Profile - New Document

Document Name Fax from remote ID RightFAX (ID:BD535D990F02)

Author BDS BDS

Client 100 Acme, Acme, and Smith

Matter 001 Smith Case

Document Type RECVFAX Received Faxes

Description August 25 deposition



Access Control
 Secure Document **Edit**

Application WANGVIEW
Wang Viewer

Retention Schedule
Type Archive
Retention Days 0

History
Created: 8/13/98 BDS
Edited: 8/13/98 BDS

Enable Content Searching **Billable**

Status:  

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

4. Complete any additional fields you want to include, then click **OK** to import the fax.

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:

1. In DOCS Open, locate and highlight the document(s) to fax. If you select multiple documents, all of the documents will automatically be combined into one fax.
2. Select **Fax** from the **Document** menu, or right-click the selected document(s) and select **Fax**. DOCS Open automatically launches the

Document History

Whenever you fax a document from within DOCS Open, the entry “Faxed via RightFAX” is automatically added to that document’s history under the **Type** column.

Retrieving DOCS Open Billing Codes

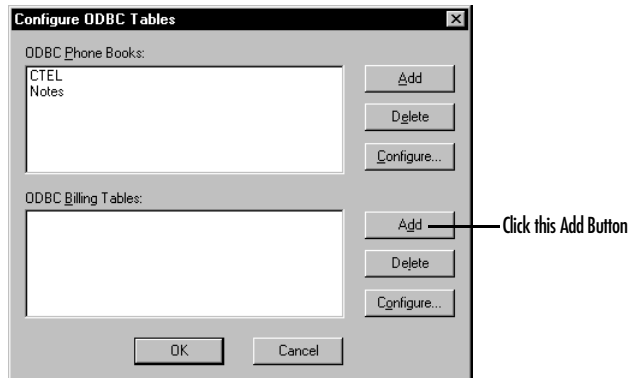
The Document Management Connector lets you access the billing codes list in DOCS Open for use in all of your outbound faxes. Each client workstation must be configured individually to access DOCS Open billing codes.

RightFAX ODBC Configuration

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

To configure ODBC in RightFAX:

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



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

Configure ODBC Billing Table

Billing Table Name: DOCS Open

ODBC Source: OKEMO

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 Use RightFAX User ID

ODBC User Password: ***** Use RightFAX Password

Records to load at once: 250

SQL Cursor Type: Dynamic

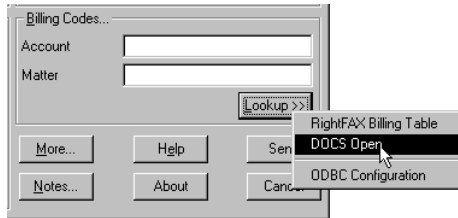
OK Cancel

3. In the **Billing Table Name** field, type a descriptive name for this billing codes table.
4. Click the [...] browse button next to the **ODBC Source** field 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 fields can be filled in exactly as shown in the example above. Otherwise, use the examples above but substitute actual field names.
6. 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 on to RightFAX, you may check those options 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**.

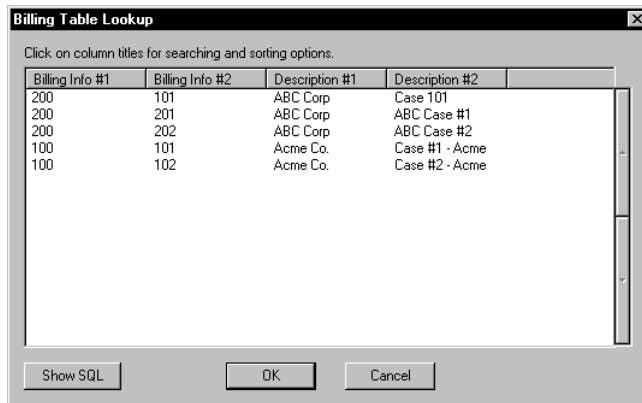
Querying DOCS Open Billing Codes

Once you have configured RightFAX to read DOCS Open ODBC billing codes, you can access DOCS Open billing codes whenever sending faxes.

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



Select “DOCS Open.” This opens the **Dialing Table Lookup** dialog listing DOCS Open billing codes:



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 (page 29), you will see only the specified number of records. To view the previous or next batch of codes, click the up- and down-arrow buttons to the right of the list. Highlight the billing code information you want and click **OK** to enter it in the **Fax Information** dialog.



chapter

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Chapter 4: Installing and Configuring the Connector for iManage

The RightFAX Document Management Connector for iManage supports the iManage client infoRite version 5.0 and higher. To install the Document Management Connector for iManage, your RightFAX server must be version 7.0 SP1 or greater. In addition, the RightFAX client must be installed on each infoRite workstation. Do not install the Document Management Connector if your RightFAX server or client version is below v7.0 SP1.

Installing the Document Management Connector

First, install the Document Management Connector on your RightFAX server.

Next, install the RightFAX client on each workstation. Only the tray icon and print-to-fax driver are required. For instructions, refer to the *RightFAX Administrator's Guide*.

Last, install the iManage integration on each client workstation.

To install the Connector to your RightFAX server:

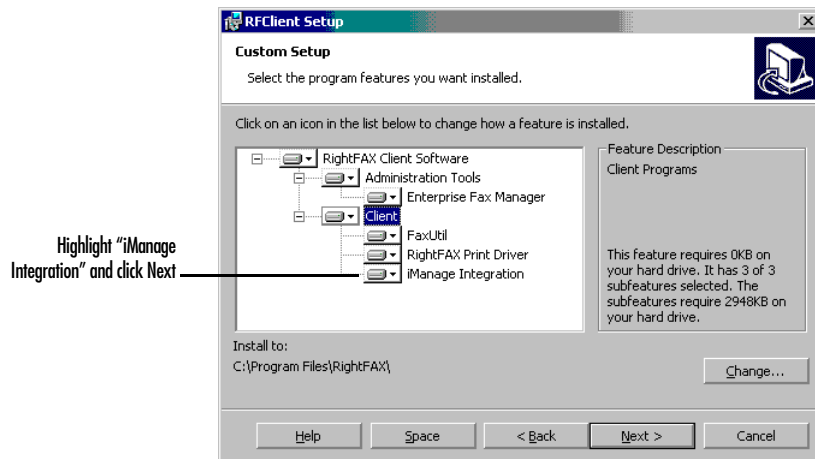
1. Insert the RightFAX Document Management Connector CD-ROM into the RightFAX server.
2. Run SETUP.EXE from the CD.
3. Follow the instructions on screen to complete the installation on the RightFAX server.

To install the iManage integration to each client workstation:

After the Connector has been installed on the RightFAX server, you must perform this client installation on each infoRite client workstation that will integrate with RightFAX.

1. On the client workstation, open a view of the `\RIGHTFAX\CLIENT\WIN32\IMANAGE` directory on the RightFAX server machine and run SETUP.EXE.
2. Click **Next** at the introductory screen.

3. Select **Modify** and click **Next**. A screen will appear asking you to specify the applications you want to install. The client applications are listed in categories. Click the [+] sign next to each category until the tree is fully expanded. If the infoRite client is found on the workstation, the “iManage Integration” option will be listed under the “Client” heading:



4. Highlight the “iManage Integration” option and click **Next**, then click **Install** to begin. The Setup program will copy the iManage integration files onto the workstation. When the files have all been copied, click **Finish** to complete the install.

Uninstalling the Connector

For step-by-step instructions for uninstalling software, refer to the *RightFAX Administrator's Guide*. The Connector should be removed in the following sequence:

1. Uninstall the iManage integration software from the client machine.
2. Uninstall the RightFAX client from the client machine.
3. Uninstall the connector from the server.





chapter

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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 iManage.

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.

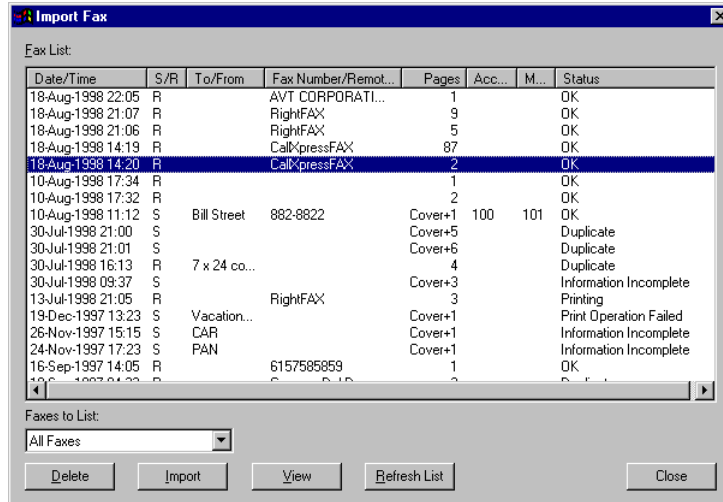
To import faxes:

1. In the iManage desktop, highlight the document folder that you want to import the fax into.

- From the infoRite desktop, select **RightFAX** from the **Document** menu, then click **Import Fax**. This opens the **Import Fax** dialog which lists all the faxes in your RightFAX mailbox:



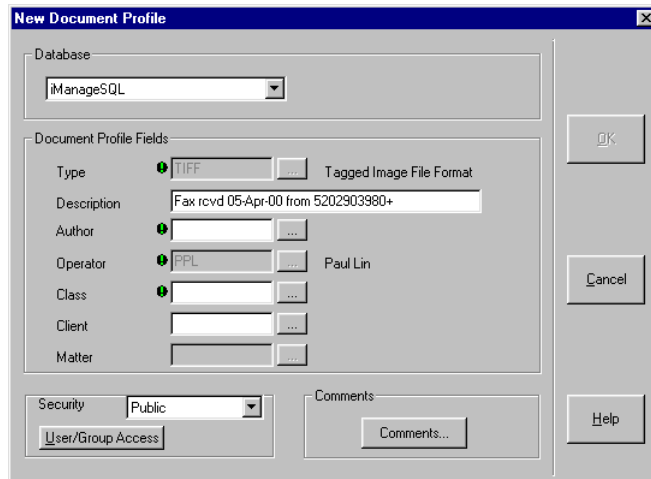
You can view or delete any fax from the list by highlighting the fax and clicking the View or Delete buttons. Deleting a fax from this dialog also removes the fax from your RightFAX mailbox.



- 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.
- Highlight the fax to import then click the **Import** button. This opens the **New Document Profile** dialog:



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.



iManage automatically fills in the **Description** field and includes when the fax was sent or received, and where it was sent to or originated from.

5. The remaining fields, defined by the iManage administrator, must be completed yourself. When you have completed the dialog, 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:

1. Highlight 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.
2. Select **RightFAX** from the **Document** menu, then click **Send Fax**. iManage automatically launches the associated application for the document(s), prints it to the RightFAX fax printer, and opens the **Fax Information** dialog.

The screenshot shows the 'Fax Information - Jane Doe on Server RFAXSERV' dialog box. It is divided into several sections:

- To...:** Fields for Name (Acme Sales), Fax Number (520) 555-1212, Voice Number, Company, and City/State. Includes 'Phonebook >>' and 'Add Entry...' buttons.
- From...:** Fields for Name (Jane Doe) and Voice Number (520) 555-1234. Includes a 'Call-Back Requested' checkbox.
- Send At...:** Includes 'Delay Send?' and 'Cheap Rates?' checkboxes, and date/time pickers (Date: 08 - 19 - 98, Time: 17 : 52).
- Transmission Details...:** Includes 'Form Type' (None), 'Priority' (Normal), and checkboxes for 'Hold for Preview?', 'Include cover sheet when sending?', and 'Use Smart-Resume?'.
- Billing Codes...:** Fields for 'Account' (100) and 'Matter' (101). Includes a 'Lookup' button.
- Buttons:** 'More...', 'Help', 'Send', 'Notes...', 'About', and 'Cancel'.

If the document contains billing codes, those codes will be entered in the **Account** and **Matter** fields automatically.

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

Document History

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

■ ■ ■



appendix

A

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.

```
[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 installation, you specified the DOCS Open document-type names for sent and received faxes as "SENTFAX" and "RECVFAX." These can be changed here.

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

The Document Management Connector associates RightFAX billing code #1 with the DOCS Open **Client** field, and 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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