



8.0 Document Management Connector Guide

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AGFA  **IntellFont**

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Contents

Introduction	5
Important Licensing Information	5
Using This Guide	5
Other Resources for RightFax Users	6
Captaris Training Services	7
Captaris Implementation Services	7
Technical Support	8
Chapter 1: Installing and Configuring the Connector for DOCS Open.....	9
Configuring the DOCS Open Server	9
Installing the Document Management Connector	12
Chapter 2: Working with Faxes in DOCS Open	15
Importing Fax Documents Into DOCS Open	15
Sending Faxes From DOCS Open	17
Retrieving DOCS Open Billing Codes	19
Chapter 3: Installing and Configuring the Connector for iManage.....	23
Installing the Document Management Connector	23
Chapter 4: Working with Faxes in iManage.....	27
Importing Fax Documents Into iManage	27
Sending Faxes From iManage.....	29
Appendix A: Customizing the PCdocs.ini File.....	33
Index	35

Introduction

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

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.

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.

`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 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

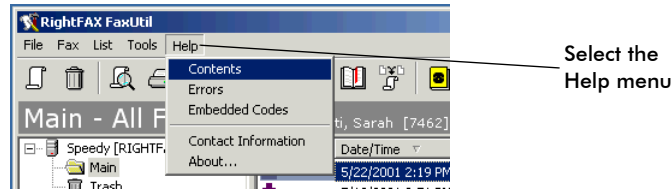
Most of the RightFax windows and dialog boxes include context-sensitive help. Typically, this help describes each field and option in a dialog box. This context-sensitive help can be launched from the question mark icon in the title bar of a dialog box.



Click the question mark icon

- 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.

Adobe Acrobat is required to view the .pdf files, and it is included on your RightFax CD-ROM. Before viewing the files, you may need to install Adobe Acrobat on the computer where you want to view them.

The RightFax Web site offers the latest product information. Updated documentation, a searchable technical 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.

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

RightFax Technical Support:

Captaris
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 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

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

Note 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 “Customizing the PCdocs.ini File” on page 33).

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 box.
2. Click **New** to open the **Document Types** dialog box.

Figure 1.1 The Document Types Dialog Box

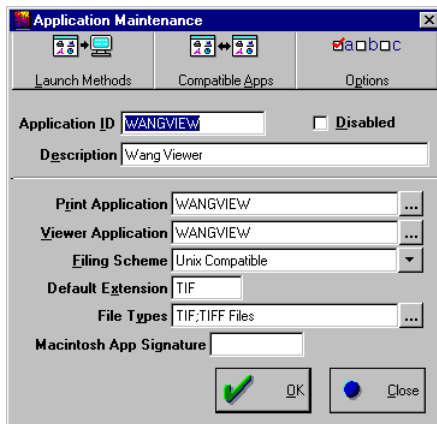
The screenshot shows the 'Document Types' dialog box with the following configuration:

- Type ID:** SENTFAX
- Full Text Index:**
- Description:** Sent Faxes
- Default Storage Type:** Archive, Delete, Keep, Optical
- Retention Days:** [Empty]
- Versions to Keep:** [Empty]
- Maximum Versions:** 99
- Maximum Sub-Versions:** 26
- Keep Criteria:** By Last Edit, By Versions
- Second Retention Storage Type:** Archive, Delete, Keep
- Second Retention Days:** [Empty]
- Target Document Server:** [Empty]
- Buttons:** OK (with green checkmark icon), Cancel (with red X icon)

3. In the **Type ID** box, type “SENTFAX.” In the **Description** box, type “Sent Faxes.” The remaining boxes in this dialog box should be set to match those for other standard document types in DOCS Open. Click **OK** to return to the **Document Types Select** dialog box.
4. Click **New** to open the **Document Types** dialog box again.
5. In the **Type ID** box, type “RECVFAX.” In the **Description** box, type “Received Faxes.” As with the SENTFAX document type, the other boxes 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 box. Click **New** to open the **Application Maintenance** dialog box.

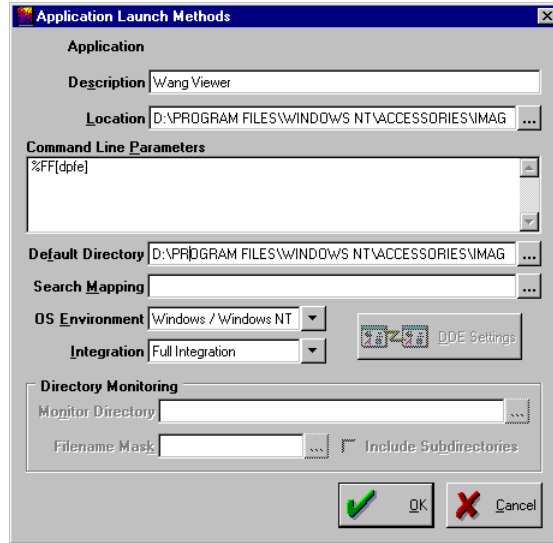
Figure 1.2 The Application Maintenance Dialog Box



7. In the **Application ID** box, type **WANGVIEW**. In the **Description** box, type **Wang Viewer**. Click **Unix Compatible** in the **Filing Scheme** list, and click **OK** (the **Application Maintenance** dialog box will not close).
8. For both the **Print Application** and **Viewer Application** boxes, click the browse button to the right of the box and select "WANGVIEW." In the **Default Extension** box, type **TIF**. In the **File Types** box, click the browse button and create a new file type called "TIF."

- When all the boxes have been completed, click **Launch Methods**. This opens the **Application Launch Methods** dialog box.

Figure 1.3 The Application Launch Methods Dialog Box



- In the **Description** box, type “Wang Viewer.” Click the browse button next to the **Location** box to locate and enter the path to the Wangimg.exe file. (This is usually located in the \\Program Files\Windows NT\Accessories \Imagevue folder.)
- Under **Command Line Parameters** type “%FF[dpte]”.
- Click **OK** to close the dialog box. To complete the DOCS Open configuration, close each dialog box and quit 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, after the connector is installed, you must install the DOCS Open integration to each client workstation.

To install the connector to your RightFax server

- Insert the RightFax Document Management Connector CD-ROM into the RightFax server.

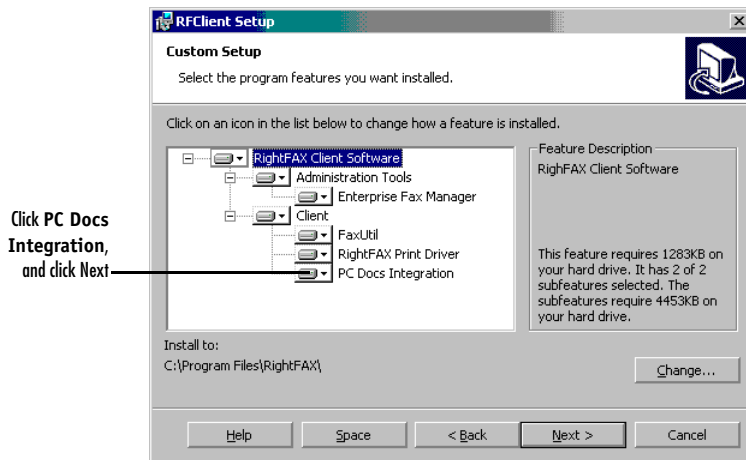
2. Run Setup.exe from the CD.
3. Follow the instructions on screen to complete the installation on the RightFax server.

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 folder 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 plus sign (+) next to each category until the tree is fully expanded. If the infoRite client is found on the workstation, “PC Docs Integration” will be listed under the “Client” heading.

Figure 1.4 The RightFax Client Custom Setup Dialog Box



4. Click **PC Docs Integration**, and click **Next**, and 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 Rfdocs.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 the \\RightFax\Client\Win32\Program Files\RightFax\Rfdocs.dll folder is shared.

■ ■ ■

Chapter 2

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.

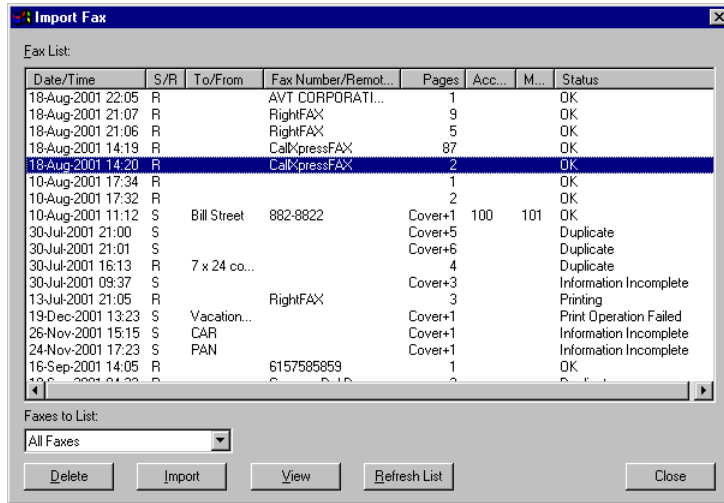
Importing Fax Documents Into DOCS Open

After 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 box. This dialog box lists all the faxes in your RightFax mailbox.

Figure 2.1 The Import Fax Dialog Box



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

2. Click the type of faxes to display (“unviewed received faxes,” “all received faxes,” “all sent faxes,” or “all faxes”) in the **Faxes to List** box.

- Click the fax to import, and then click **Import**. This opens the **Document Profile** dialog box.

Figure 2.2 The Document Profile Dialog Box

The screenshot shows a dialog box titled "Document Profile - New Document". It contains the following fields and sections:

- Document Name:** Fax from remote ID RightFAX (ID:BDS35D990F02)
- Author:** BDS
- Client:** 100
- Matter:** 001
- Document Type:** RECVFAX
- Description:** August 25 deposition
- Access Control:** Secure Document, Edit button
- Application:** WANGVIEW, Wang Viewer
- Retention Schedule:** Type: Archive, Retention Days: 0
- History:** Created: 8/19/01 BDS, Edited: 8/19/01 BDS
- Enable Content Searching:** Enable Content Searching, Billable
- Status:** (empty)
- Buttons:** OK, Cancel

Note 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 box.

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

- Complete any additional boxes you want to include, and 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

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

associated application for the document(s), prints it to the RightFax fax printer, and opens the **Fax Information** dialog box.

Figure 2.3 The Fax Information Dialog Box

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

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

Faxing from within a document's native application

If you have opened a document from DOCS Open 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** dialog box and click **Send** to transmit the fax. A record of the fax event will also be stored in the document's history.

Automatic billing code verification

If the document you are faxing contains billing codes, those codes are entered automatically in the **Account** and **Matter** boxes in the **Billing Codes** group box. However, if you manually change either of these billing codes, the Document

Management Connector will automatically query DOCS Open and confirm that the new billing codes are valid. If you enter an invalid billing code, the connector will display the message “Invalid Client/Matter Code.”

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.

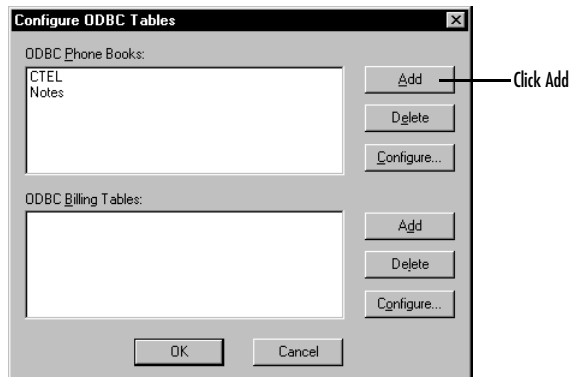
RightFax ODBC configuration

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

To configure ODBC in RightFax

1. Click the RightFax tray icon in the corner of your taskbar to open a shortcut menu. Click **ODBC Configuration**. This opens the **Configure ODBC Tables** dialog box.

Figure 2.4 The Configure ODBC Tables Dialog Box



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

Figure 2.5 The Configure ODBC Billing Table Dialog Box

Configure ODBC Billing Table

Billing Table Name: DOCS Open

ODBC Source: DKEMD

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

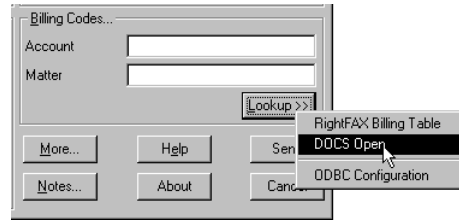
3. In the **Billing Table Name** box, type a descriptive name for this billing code table.
4. Click the browse button next to the **ODBC Source** box and select “DOCS Open ODBC” driver.
5. Relate the fields of the DOCS Open database to the standard RightFax billing code fields. This is done with an SQL query statement. If the system administrator configured the DOCS Open database with the default settings, these boxes can be filled in exactly as shown in the example (see “[Figure 2.5: The Configure ODBC Billing Table Dialog Box](#)” on page 20). Otherwise, use the examples but substitute actual field names.
6. In the **ODBC User ID** and **ODBC User Password** boxes, 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 can select the check boxes instead.
7. If you have a very large database of billing codes, you can limit the number of records displayed at one time by entering the limit in the **Records to Load at Once** box.
8. Set **SQL Cursor Type** to “Dynamic.” When you have completed the dialog box, click **OK**.

Querying DOCS Open billing codes

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

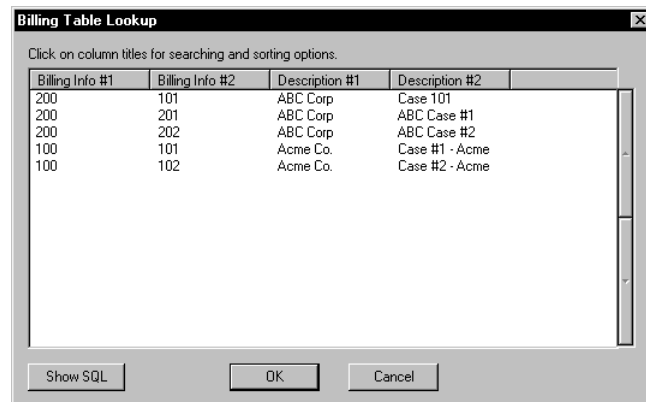
In the RightFax **Fax Information** dialog box, click **Lookup** to select RightFax or DOCS Open billing codes.

Figure 2.6 The Lookup Menu



Click **DOCS Open**. This opens the **Dialing Table Lookup** dialog box listing DOCS Open billing codes.

Figure 2.7 The Billing Table Lookup Dialog Box



If you limited the number of records displayed at one time in the **Records to Load at Once** box in the **Configure ODBC Billing Table** dialog box (page 20), you will see only the specified number of records. To view the previous or next batch of codes, click the arrows to the right of the list. Click the billing code information you want, and click **OK** to enter it in the **Fax Information** dialog box.

Chapter 3

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 higher. 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 version 7.0 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

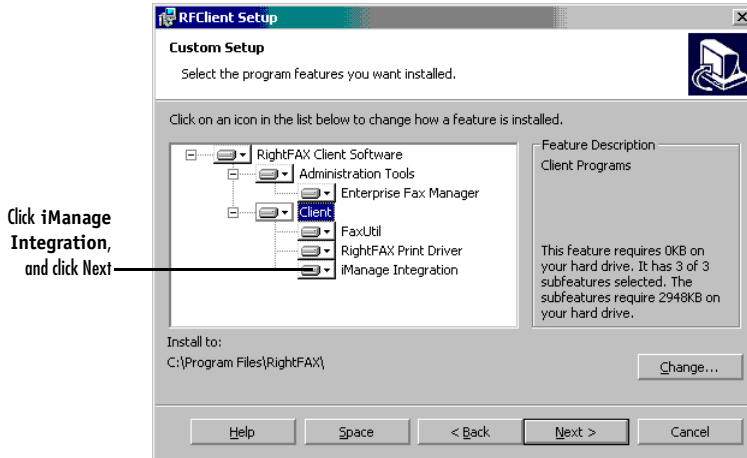
1. Insert the RightFax Document Management Connector CD-ROM into the RightFax server.
2. Run Setup.exe from the CD.
3. Follow the instructions on screen to complete the installation on the RightFax server.

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 folder 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 plus sign (+) next to each category until the tree is fully expanded. If the infoRite client is found on the workstation, “iManage Integration” will be listed under the “Client” heading.

Figure 3.1 The iManage Install Option



4. Click **iManage Integration**, click **Next**, and 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.

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Chapter 4

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

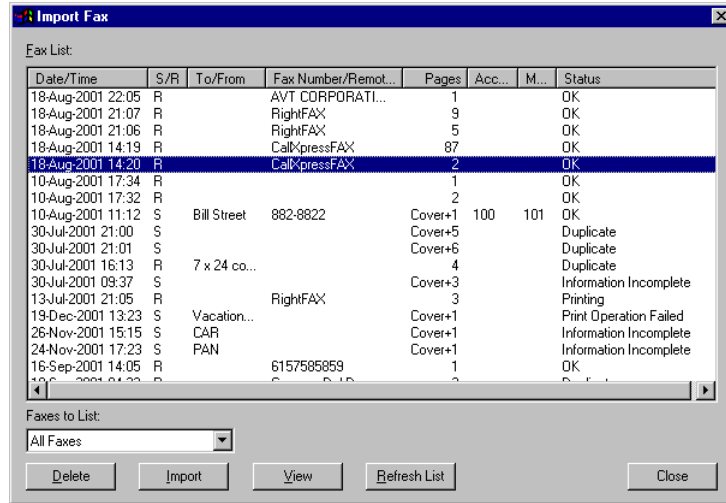
Once the Document Management Connector has been installed on your client workstation, you can import faxes as documents into the iManage system.

To import faxes

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

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

Figure 4.1 The Import Fax Dialog Box

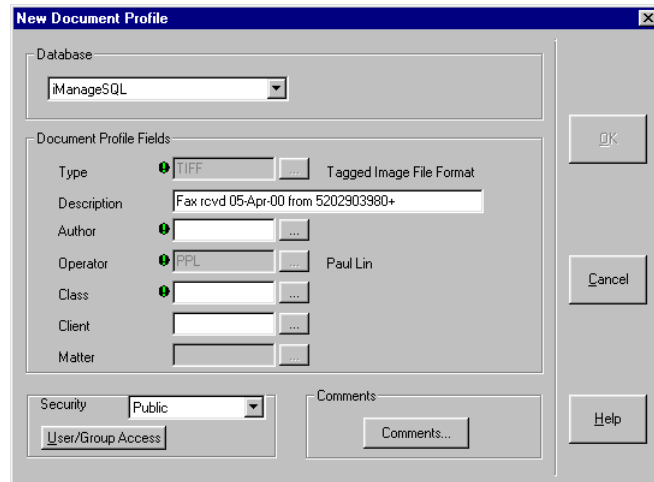


Note You can view or delete any fax from the list by clicking the fax and clicking View or Delete. Deleting a fax from this dialog box also removes the fax from your RightFax mailbox.

- Click the type of faxes to display (“unviewed received faxes,” “all received faxes,” “all sent faxes,” or “all faxes”) in the **Faxes to List** box.

- Click the fax to import, and then click **Import**. This opens the **New Document Profile** dialog box.

Figure 4.2 The New Document Profile Dialog Box



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

Note 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.

- The remaining boxes, defined by the iManage administrator, must be completed yourself. When you have completed the dialog box, 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

- Click 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, and 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 box.

Figure 4.3 The Fax Information Dialog Box

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

3. Complete all italicized boxes 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

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 names for DOCS Open document types 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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Index

A

automated billing codes [18](#)

B

billing codes

configuring RightFax [19](#)

ODBC [19](#)

on faxes sent from DOCS Open [18](#)

verifying [18](#)

C

configure

connector for DOCS Open [9](#)

RightFax to use DOCS Open billing codes [19](#)

connector for DOCS Open

configuring the server [9](#)

installing [12](#)

connector for iManage

installing [23](#)

context-sensitive help [6](#)

D

DOCS Open

importing faxes [15](#)

sending documents as faxes [17](#)

document history [19, 30](#)

F

faxes

importing into DOCS Open [15](#)

importing into iManage [27](#)

sending from DOCS Open [17](#)

faxes (continued)

sending from iManage [29](#)

H

help, online [6](#)

history

entry for DOCS Open fax event [19](#)

entry for iManage fax event [30](#)

I

iManage

importing faxes [27](#)

sending documents as faxes [29](#)

import faxes [15, 27](#)

install

connector for DOCS Open [12](#)

connector for iManage [23](#)

O

ODBC billing codes [19](#)

online help [6](#)

P

PCDOCS.INI [33](#)

Q

query

DOCS Open billing codes in RightFax [21](#)

querying in RightFax [21](#)

R

- RightFax
 - configuring to use DOCS Open billing codes 19
 - technical support 8
 - training 7

S

- send faxes 17, 29
- support, technical 8

T

- technical support 8
- training 7

V

- verifying billing codes 18