



8.0 SecureDocs Module Guide

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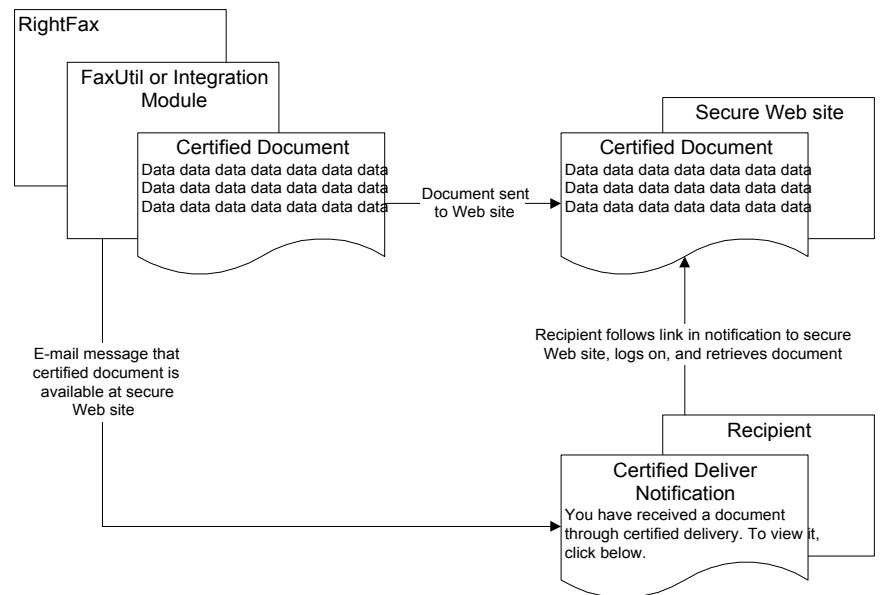
Introduction

The RightFax SecureDocs Module lets you send documents via certified delivery or to e-mail addresses as encrypted Adobe® Acrobat® portable document format (PDF) files. You can use SecureDocs in a desktop environment (sending documents from FaxUtil or the RightFax Web Client) or in a production environment (sending documents via the RightFax Integration Module). For information on the differences between desktop and production document delivery, see the *RightFax Integration Module Guide*.

Sending documents via certified delivery

When you send a document via certified delivery, the document is not sent directly to the recipient. Instead, it is sent to your organization’s SecureDocs certified delivery Web site. The recipient receives an e-mail message that indicates that a certified document is available and that includes a link to the SecureDocs certified delivery Web site. The recipient uses the link to connect to the Web site. They must log in order to view all waiting documents.

Figure 0.1 Certified Delivery Document Flow



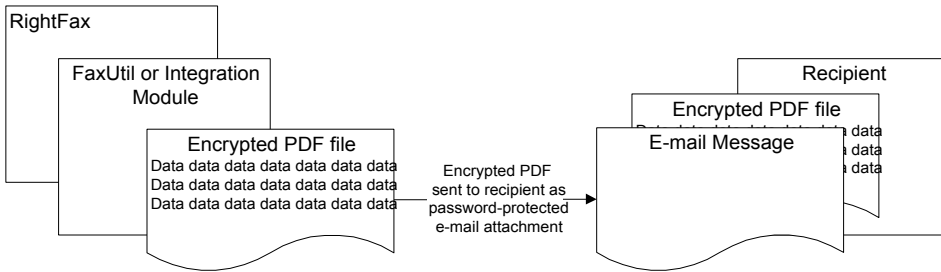
Recipients who receive documents via certified delivery for the first time must create a password upon accessing the SecureDocs Web site. Each subsequent time recipients access the site, they must supply the password. Certified document recipients can change their passwords, and they can have their passwords e-mailed to them if they forget.

RightFax stores the history of each certified document so you can track items such as when the document was sent, when it was retrieved by the user (or if it was not retrieved), and when each attachment to the certified document was viewed.

Sending encrypted documents

When you send an encrypted PDF document, the recipient receives an e-mail message with your document attached as a PDF file. You can choose to password-protect the document so that the recipient must provide the password in order to open and view the document.

Figure 0.2 Encrypted PDF Document Delivery Flow



Using This Guide

The *RightFax SecureDocs Module Guide* is designed for use by RightFax administrators who will be installing and configuring the SecureDocs module and it includes information for RightFax users on how to send documents via certified delivery and how to create encrypted documents.

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.

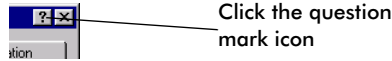
Other Resources for RightFax Users

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 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.

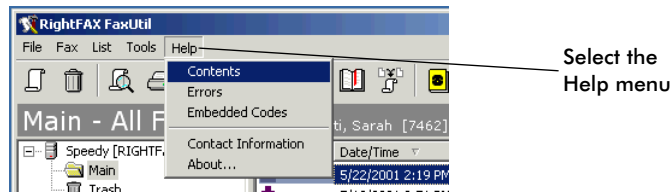
Getting help online

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.

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.

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 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 Customer 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



Chapter 1

Installing the SecureDocs Module

This chapter describes the steps to install the SecureDocs Module and the certified delivery Web site.

It also provides instructions for:

- Changing Web site information on the RightFax server after the SecureDocs Module is installed. See ["Using Enterprise Fax Manager to Change Configurations"](#) on page 18.
- Customizing the SecureDocs certified delivery Web pages for your organization. See ["Modifying the SecureDocs Web Pages"](#) on page 25.
- Synchronizing the database of recipient accounts that is maintained on the RightFax server. See ["Synchronizing the SecureDocs Database"](#) on page 27.

Minimum System Requirements

- RightFax server version 8.0 with hot fix 1 (or later).
- For the SecureDocs certified delivery Web site, Microsoft Internet Information Server (IIS) version 4.0 or later.
- For production document delivery, the InternetLink Module.

Understanding the Installation Process

Installing the SecureDocs Module requires the following basic steps:

1. Install the RightFax server. For instructions, see the *RightFax Administrator's Guide*.
2. Install the RightFax server hot fix 1 (or a later version). To obtain the hot fix, go to www.RightFax.com/Support.
3. If you are using the Integration Module, activate the InternetLink Module. For instructions, see the *RightFax InternetLink Module Guide*.
4. Install the SecureDocs Module on the RightFax server. To begin, see ["Installing the SecureDocs Module" on page 12](#).
5. Install the certified delivery Web site on the IIS server. This is the Web site where sent documents are viewed by recipients. To begin, see ["Installing the Certified Delivery Web Site" on page 15](#).

Installing the SecureDocs Module

Before You Begin

Before you install the SecureDocs Module, determine where you will install the certified delivery Web site. You will need this information when configuring the SecureDocs Module during installation.

If you have the SecureDocs Module version 8.0 installed, uninstall it before you install version 8.01.

The installation program installs a database on the RightFax server for certified delivery accounts and links to documents. The SecureDocs Module on the certified delivery Web server will access the database using an SQL account that you will set up during this installation. Be prepared to enter a user name and password for the SQL database that will be created during installation and granted access to the SQL database required by SecureDocs.

At the end of the installation, the computer will need to be re-started to complete the installation. When you re-start and log on again, the SecureDocs installation will continue. If you cancel, the installation will not finish. You will be required to begin the installation from the beginning to complete it.

Installing the Module

1. Insert the SecureDocs Module CD in the RightFax server. If autorun is not enabled, navigate to Setup.exe in the root directory of the CD and double-click to run it.
2. When prompted to accept the terms of the license agreement, click to accept.
3. When prompted, enter your user name and organization.
4. When prompted to select a WorkServer, select the WorkServer that will handle document conversions to PostScript and portable document format (PDF) format.
5. In the **IIS Server Information** window, in the **Web Server** box, the RightFax server computer name appears. If you will be installing the certified delivery Web site on a different server, enter the fully qualified domain name of the IIS server.

Figure 1.1 The IIS Server Information Window

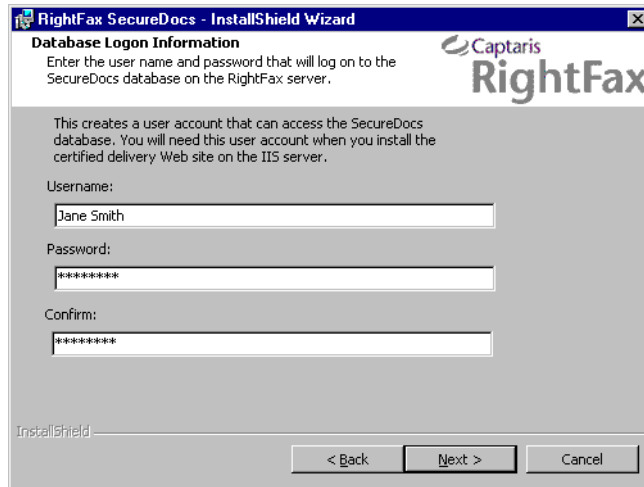
The screenshot shows a Windows-style dialog box titled "RightFax SecureDocs - InstallShield Wizard". The main content area is titled "IIS Server Information" and includes the instruction "Please enter your information." and the Captaris RightFax logo. There are two text input fields: "Web Server" with the value "web1.captaris.com" and "Web Site" with the value "SecureDocs". At the bottom of the dialog, there are three buttons: "< Back", "Next >", and "Cancel".

6. In the **Web Site** box, enter the name for the certified delivery Web site, and then click Next.

7. In the **Database Logon Information** window, enter the user name and password for the account that can log on to the certified delivery database. Write down this information, because you will need to enter this user name and password during the installation of the certified delivery Web site (see ["Installing the Certified Delivery Web Site"](#) on page 15).

If you do not remember the user name and password, you must contact RightFax technical support to create a new account.

Figure 1.2 The Database Logon Information Window



The screenshot shows a Windows-style dialog box titled "RightFax SecureDocs - InstallShield Wizard". The main heading is "Database Logon Information". Below the heading, it says: "Enter the user name and password that will log on to the SecureDocs database on the RightFax server." In the top right corner, there is a logo for "Captaris RightFax". The main text area contains: "This creates a user account that can access the SecureDocs database. You will need this user account when you install the certified delivery Web site on the IIS server." There are three input fields: "Username:" with the text "Jane Smith", "Password:" with "*****", and "Confirm:" with "*****". At the bottom left, it says "InstallShield". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

8. During the installation, you will be prompted to re-start the computer. When the computer re-starts, you must log on, and the installation will continue. If you cancel, the installation will not be completed. You will be required to begin the installation from the beginning to complete it.

Installing the Certified Delivery Web Site

Before You Begin

During the installation, you can specify SMTP mail hosts for the following services:

- Send passwords. To view documents at the certified delivery Web site, a recipient must create an account and a password on the site. If a user forgets the password, the SecureDocs Module sends the password in an e-mail message on request. This message is sent from the SecureDocs Module on the IIS server.
- Send messages that a document is waiting. When a document is sent via certified delivery, the recipient receives an e-mail message that the document can be viewed at the certified delivery Web site. This message is sent from the SecureDocs Module on the RightFax server.

At the end of the installation, the computer may re-start. If so, the computer must re-start for the SecureDocs application to function properly.

Installing the Web Site

1. To begin, complete one of the following options:
 - If you are installing the SecureDocs Web site on the RightFax server, navigate to the RightFax\SecureDocs IIS Install directory. Double-click to run Setup.exe.
 - If you are *not* installing the SecureDocs Web site on the RightFax server, insert the SecureDocs Module CD in the Web server computer. Navigate to the SecureDocs IIS Install directory, and double-click to run Setup.exe.
2. When prompted to accept the terms of the license agreement, click to accept.
3. When prompted, enter your user name and organization.
4. In the **Required Web Site Information** window, complete the following boxes:
 - In the **Root Web Site Name** box, enter the name of the root Web site on the IIS server where the certified delivery Web site will be installed.
 - In the **Virtual Directory Name** box, enter the name of the certified delivery Web site that you entered when installing the SecureDocs Module ([see "Installing the Module" on page 13.](#))
 - In the **SMTP Host Name** box, enter the name of the SMTP mail host that will send passwords to users of the certified delivery Web site. This message is sent from the SecureDocs Module on the IIS server.

- In the **RightFax Server Name** box, if you are installing the SecureDocs certified delivery Web site on this RightFax server, enter a period (.). If you are installing the Web site on a computer other than the RightFax server, enter the fully qualified domain name of the remote RightFax server.

Figure 1.3 The Required Web Site Information Window

RightFax Certified Delivery - InstallShield Wizard

Required Web Site Information

Please enter the names of the; IIS Root website, the Virtual Directory, the SMTP Server, and the RightFax Server, you want this app to use.

Root Web Site Name:

Virtual Directory Name:

SMTP Host Name:

RightFax Server Name (= local):

InstallShield

< Back Next > Cancel

5. To pick up documents at the certified delivery Web site, a recipient must create an account and a password on the site. If a user forgets the password, the SecureDocs Module sends the password in an e-mail message on request.

In the **Optional Web Site Information** window, you can specify information to be sent with these e-mail messages. (You can also enter this information later. To do so, see ["Configuring the Certified Delivery Web Site" on page 19.](#))

Complete the following boxes:

- In the **Body Text File** box, enter the file name and path to a text file that contains the text of the e-mail messages that are sent with passwords to recipients who request them. The default message is "Requested Certified Delivery Password: *password*." To create a text file, see ["Creating the Message to Send with Passwords" on page 22.](#)
- In the **Email From Address** box, enter the e-mail address from which the messages will be sent. The default address is *computer name@domain name*.

- In the **Email Name** box, enter the name that should appear as the sender of the e-mail message. The default is “Certified Document Delivery.”
- In the **Email Subject** box, enter the text that will appear in the subject line of the e-mail message. The default is “Certified Document Delivery.”

Figure 1.4 The Optional Web Site Information Window

RightFax Certified Delivery - InstallShield Wizard

Optional Web Site Information

Optionally, you can enter a text file name to use as the message body, your email from address, email display name, and the subject you want to use.

Body Text File:

Email From Address:

Email Name:

Email Subject:
Requested Certified Delivery Password

InstallShield

< Back Next > Cancel

6. In the **Database Logon Information** window, enter the user name and password for the account that can log on to the certified delivery database. Enter the same user name and password that were entered during the installation of the SecureDocs Module on the RightFax server (as described in [“Installing the SecureDocs Module”](#) on page 12).

If you do not remember the user name and password that were entered, you must contact RightFax technical support to create a new account. To change the user name and password after installation, contact RightFax technical support.

Figure 1.5 The Database Logon Information Window

7. At the end of the installation, the computer may re-start. If so, the computer must re-start for the SecureDocs application to function properly.

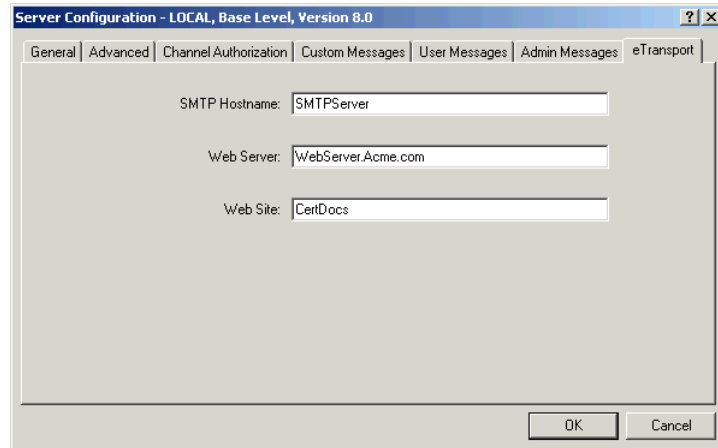
Using Enterprise Fax Manager to Change Configurations

After the SecureDocs Module is installed, you can use Enterprise Fax Manager to change the the Web server name, the Web site name, and the SMTP mail host that will send messages to notify recipients that a document can be viewed at the certified delivery Web site.

1. On the RightFax server, on the **Start** menu, select **Programs > RightFax > Enterprise Fax Manager**. The **Enterprise Fax Manager** window opens.
2. In the **Fax Servers** list, select the server where the SecureDocs Module is installed.
3. In the **Service Name** list, double-click **RightFax Server Module**. The **Server Configuration** window opens.
4. On the **eTransport** tab, in the **SMTP Hostname** box, enter the name of the mail host that will send messages to notify recipients that a document can be

viewed at the certified delivery Web site. This message is sent from the SecureDocs Module on the RightFax server.

Figure 1.6 The eTransport tab



5. In the **Web Server** box, enter the fully qualified domain name of the IIS server where the certified delivery Web site is installed. If the RightFax Server module is stopped, this box is unavailable.
6. In the **Web Site** box, enter the name of the certified delivery Web site. If the RightFax Server module is stopped, this box is unavailable.

Configuring the Certified Delivery Web Site

On the IIS server, you can define the following settings for the certified delivery Web site:

- Specify information to be sent with e-mail messages that are sent to recipients of certified delivery documents. See ["Specifying the SMTP Mail Host, Sender E-mail Address, and Sender Name"](#) on page 20.
- Recipients of documents via SecureDocs certified delivery must obtain passwords before they can view documents on the certified delivery Web site. If a user forgets the password, the SecureDocs Module sends the password in an e-mail message on request. See ["Including Messages with Passwords"](#) on page 21.
- Specify the location of the SecureDocs Web site. See ["Establishing the Location of the SecureDocs Web Site"](#) on page 22.
- Support for Netscape 6. See ["Supporting Netscape 6"](#) on page 23.

Specifying the SMTP Mail Host, Sender E-mail Address, and Sender Name

To view documents at the certified delivery Web site, a recipient must create an account and a password on the site. If a user forgets the password, the SecureDocs Module sends the password in an e-mail message on request.

Use this procedure to specify the information that is sent with passwords in e-mail messages from the SecureDocs Module on the IIS server.

To specify the information that is sent with passwords

1. On the IIS server where the certified delivery Web site is installed, on the **Start** menu, select **Programs > SecureDocs Config**.
2. Click the **SMTP Mail** tab.

Figure 1.7 The SMTP Mail Tab

The screenshot shows a dialog box titled "SecureDocs Configuration" with a close button (X) in the top right corner. The dialog has four tabs: "SMTP Mail", "SMTP Message", "Web Server", and "Netscape 6". The "SMTP Mail" tab is selected. Inside the dialog, there is a small globe icon and a text box containing the message: "This page contains values specific to the delivery of SMTP EMail used in the SecureDocs process." Below this, there are two main sections. The first is labeled "SMTP Host" and contains a text box with the text "server.domain.com". The second section is labeled "EMail Addresses" and contains two text boxes. The first text box is empty, and the second text box is empty. At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Apply".

3. In the **SMTP Host** box, enter the name of the SMTP mail host that will send passwords from the SecureDocs certified delivery Web site.
4. In the first **EMail Addresses** box, enter the e-mail address from which the messages will be sent. The default address is *computer name@domain name*.

5. In the second **Email Addresses** box, enter the name that should appear as the sender of the e-mail message. The default is “Certified Document Delivery.”
6. Click **Apply**.

Including Messages with Passwords

Recipients of documents via SecureDocs certified delivery must obtain passwords before they can view documents at the certified delivery Web site. If a user forgets the password, the SecureDocs Module sends the password in an e-mail message on request.

To specify the message text and subject line that are sent in e-mail messages with passwords, complete the following task.

To include a message

1. On the IIS server where the certified delivery Web site is installed, on the **Start** menu, select **Programs > SecureDocs Config**.
2. Click the **SMTP Message** tab.

Figure 1.8 The SMTP Message Tab



3. In the **Body Text File** box, you can enter the file name and path to the file that contains unique message text for your installation. If you do not enter a file name, the default message is used. The default message is “Requested Certified Delivery Password: *password*.” For information on creating a message file, see “Creating the Message to Send with Passwords” on page 22.
4. In the **Subject Line** box, enter the text that will appear in the subject line of the e-mail message.
5. Click **Apply**.

Creating the Message to Send with Passwords

When a user requests it, the SecureDocs Module sends a password to a user in an e-mail message. The default text for the message is “Requested Certified Delivery Password: *password*.”

To include a unique message to send with passwords, create a text (ASCII) file. Insert the variable `^password^` in the message where the recipient’s password should appear.

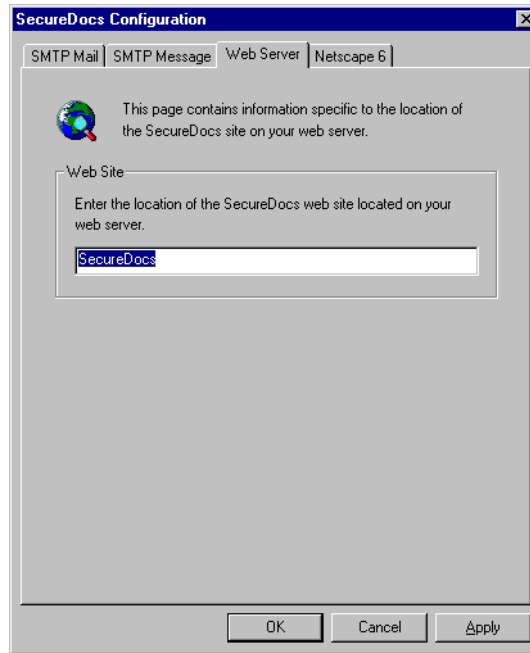
Store the text file in a folder that is accessible to the SecureDocs Module on the IIS server.

Establishing the Location of the SecureDocs Web Site

1. On the IIS server where the certified delivery Web site is installed, on the **Start** menu, select **Programs > SecureDocs Config**.

2. Click the **Web Server** tab.

Figure 1.9 The Web Server Tab



3. In the **Web Site** box, the name of the virtual directory on the IIS server appears, as set during SecureDocs installation.
4. Click **Apply**.

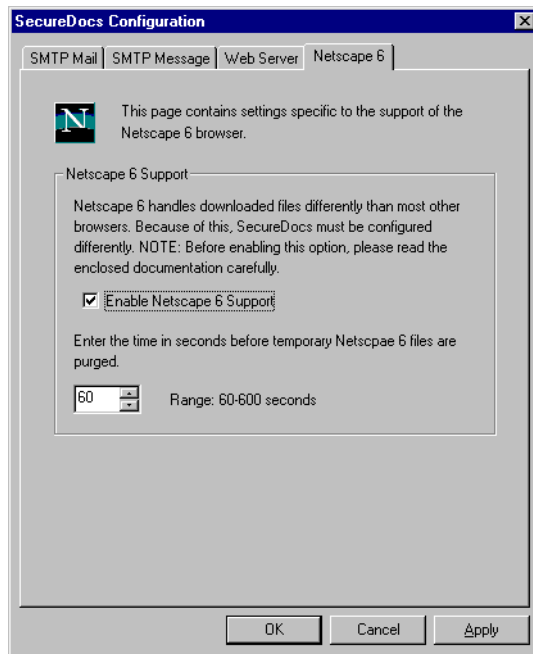
Supporting Netscape 6

Warning Enabling Netscape 6 support might create a security risk. By default, the SecureDocs Module does not support Netscape 6 because of the way that Netscape 6 downloads files. Netscape 6 requires that the SecureDocs Web site create a temporary file on the Web server long enough for Netscape 6 to download it. During the time that the temporary file is stored on the SecureDocs Web site, a person with appropriate knowledge and access could retrieve the file.

1. On the IIS server where the certified delivery Web site is installed, on the **Start** menu, select **Programs > SecureDocs Config**.

2. Click the **Netscape 6** tab.

Figure 1.10 The Netscape 6 Tab



3. Select the **Enable Netscape 6 Support** check box to enable users with Netscape 6 to obtain certified documents from the SecureDocs Web site.
4. In the **Range** box, enter the number of seconds that temporary files are held on the SecureDocs Web site before they are deleted.
5. Click **Apply**.

Modifying the SecureDocs Web Pages

You can personalize the appearance of the SecureDocs certified delivery Web site. For example, you may want to add your company name, logo, or messages to the site.

You can change the appearance of the Web site by modifying the HTML code for the site pages.

In pages are located in the SecureDocs\Includes directory. The files are:

- Footer.html
- Header.html. Contains the Captaris logo.
- PageFooter.html. Contains Captaris copyright information
- PageHeader.html.

Figure 1.11 A SecureDocs Web Page

The screenshot shows a web page for 'RightFax' by Captaris. The page title is 'Inbox for lisa@oswego.com'. Below the title is a horizontal line and the instruction 'Click on a document number to see more detailed information.' A play button icon is shown with the text 'Indicates the currently active document.' Below this is a table with columns: Read, Document Number, Delete, Sender, Subject, and Transmission Time. The table contains two rows of document information. The second row is selected, indicated by a checkmark in the 'Read' column. Below the table is a status bar showing 'Displaying documents 1 through 2' and 'Total Documents 2'. A button labeled 'Delete selected documents' is positioned below the status bar. At the bottom of the page, it says 'Current Page: 1' and a footer with copyright information: 'Copyright © 2001 Captaris, Inc Thursday, Jul 19, 2001 12:22:54 PM'.

Read	Document Number	Delete	Sender	Subject	Transmission Time
	PROD1578	<input type="checkbox"/>			Thu Jul 19 05:12:35 2001
✓	PROD1575	<input type="checkbox"/>			Thu Jul 19 05:05:07 2001

Displaying documents 1 through 2 Total Documents 2

Delete selected documents

Current Page: **1**

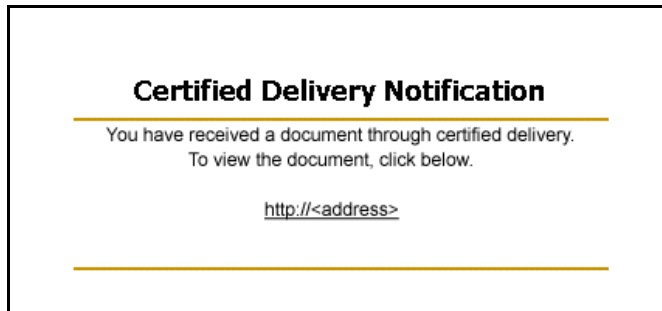
Copyright © 2001 Captaris, Inc
Thursday, Jul 19, 2001
12:22:54 PM

Creating a Message to Notify a Recipient of a Certified Delivery

You can specify the appearance of the e-mail message that notifies users when they have documents waiting for them at the SecureDocs certified delivery Web site.

When the certified delivery notification is sent, SecureDocs refers to the Windows registry for the source of the message text. If the message files do not exist, then the default notification is sent. The default notification is shown in the following example.

Figure 1.12 The Default HTML Notification



To create the message

1. Create two identical files, one in HTML format and one in text format. (The recipient's e-mail application will determine which message can appear.)
2. In each file, insert the variable `^CERTIFIEDURL^`, which represents the URL to the document on the SecureDocs certified delivery Web site.
3. Edit the Windows registry key `HKEY_LOCAL_MACHINE\Software\RightFax\Production\INL`. Create the registry values `AltMimeHTML` and `AltMimeText` with the data type `REG_SZ`. In the string editor, enter the path to the corresponding message file (for example, `D:\RightFax\Message.htm`).

Synchronizing the SecureDocs Database

The SecureDocs certified delivery database includes a table of recipient e-mail addresses associated with the fax handles of the faxes that are stored in the RightFax database. The database should be synchronized periodically with the RightFax database. For example, if documents are deleted from the RightFax database, the synchronization will delete the fax handles of deleted documents in the database. Captaris recommends that you synchronize the database each day.

The SecureDocs database is located on the RightFax server, unless you have moved it or you have created a unique ODBC database.

To synchronize the database

Locate the utility file SynchDB.exe in the directory SecureDocs\Apps.

The syntax is `SynchDB [RightFax server] [Protocol] SecureDocs`. The following table describes the data in the command line.

Table 1A SynchDB.exe Command Line Elements

Element	Description
RightFax server	The fully qualified domain name or TCP/IP address of the RightFax server to synchronize with.
Protocol	Network protocol to use when connecting to the RightFax server: 1 = Named pipes 2 = Internet packet exchange (IPX) for OS/2 (not supported) 3 = Sequenced packet exchange (SPX) 4 = TCP/IP 5 = Internet packet exchange (IPX) 6 = Secure TCP/IP 7 = Secure sequenced packet exchange (SPX)
SecureDocs	ODBC data source name of the SecureDocs database.

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Chapter 2

Sending Documents for Certified Delivery with the Integration Module

When you send a certified document, the document is sent to your SecureDocs certified delivery Web site, and the recipient receives a notification that he or she can retrieve the document. This chapter explains how to send certified documents in a production environment with FCL via the RightFax Integration Module.

Understanding Certified Delivery Documents Created with FCL

Like other documents that the Integration Module processes, certified documents are comprised of FCL commands and host data. In addition to the standard FCL commands that are used with any RightFax document, certified documents require the `type certified` command and InternetLink FCL commands for addressing and sending an e-mail message.

Thus, to send a certified document, use three types of FCL commands. The following table describes these commands.

Table 2A Types of FCL Commands for Certified Delivery

Command	Description
<code>type certified</code>	This is the SecureDocs command that identifies the document as a certified document. This command has no function unless you have the InternetLink Module and the SecureDocs Module.
InternetLink FCL commands, like <code>to</code> and <code>from</code>	These commands specify the recipient, the sender, etc. They have no function unless you have the InternetLink Module. For a complete list, see the <i>RightFax InternetLink Module Guide</i> .
Standard FCL commands, like <code>begin</code> and <code>end</code>	These commands can specify a wide range of options. Some are required, and some are optional. For a complete list, see the <i>RightFax Integration Module Guide</i> .

Creating Certified Documents with FCL

Creating a certified document with FCL is similar to creating an InternetLink document, except that you must use the `{{type certified}}` command. Certified documents require four FCL commands. Using only these commands creates a functional, though rudimentary, certified document. Without all of these commands, however, your certified document will not function.

The following table lists the required commands.

Table 2B Required FCL Commands for Certified Delivery

Command	Description
<code>{{begin}}</code>	Must appear as the first command in a certified document; instructs the Integration Module to process all information until an <code>{{end}}</code> command appears. This standard FCL command is described in the <i>RightFax Integration Module Guide</i> .
<code>{{end}}</code>	Must appear as the last command in a certified document; instructs the Integration Module to finish processing the information that began with the previous <code>{{begin}}</code> command. This standard FCL command is described in the <i>RightFax Integration Module Guide</i> .
<code>{{to}}</code>	Is the recipient's e-mail address. This InternetLink FCL command is described in the <i>RightFax InternetLink Module Guide</i> .
<code>{{type certified}}</code>	Establishes that the document will be sent via certified delivery. The document itself will be sent to the SecureDocs Web site and the recipient will receive a notification that the document is available.

While not required, the `{{from}}` and `{{subject}}` commands are recommended. If you do not use these commands, then the default *from* address is "admin@<domain name>" and the default *subject* is "E-document." Any information that does not fall between the `{{begin}}` and `{{end}}` commands is ignored.

You can use any of the other InternetLink FCL commands in the FCL you use to create a certified document. This includes the `{{from}}` and `{{subject}}` commands, which override the settings that you created with the SecureDocs Configuration program (see "Installing the SecureDocs Module" on page 11).

Selecting an Image Type

A document's *image type* refers to the type of image file that is created and sent for certified document delivery. Your choices are PDF and TIF for the body of the document. If you use a cover page, the cover and body will be TIF. To choose an image type, use the `{{imagetype}}` command.

PDF is the most universal image type, and Captaris recommends that you use it when you are sending certified documents. The default format for certified documents is PDF, meaning that if you do not specify an `{{imagetype}}`, then the certified document will be sent as a PDF file. The examples in this chapter use the `{{imagetype}}` command in all instances to avoid confusion, even though `{{imagetype pdf}}` is redundant (because PDF is the default format).

Understanding the `{{imagetype}}` Command

When used with the `{{type certified}}` command, `{{imagetype}}` selects the graphic format.

Syntax `{{imagetype <pdf|group3|group4>}}`

Example `{{imagetype pdf}}`

The example specifies PDF as the graphic format for a certified document.

Attaching Documents

If you want to attach documents to the main document, the attachments will be converted with the same rules for attachments as InternetLink documents:

- If you use the `{{attach}}` command, then the to-be-attached document and the main document are merged into one graphic file (determined by the `{{imagetype}}` command), with the attachment starting a new page after the last page of the main document.
- If you use the `{{attach native}}` command, then the main document is converted to a graphic file (determined by the `{{imagetype}}` command), and the to-be-attached document is left in its native format. The attachment will be a separate file that the recipient can download from the SecureDocs Web site.
- If you use the `{{beginnative}}` command, then an attachment (whose name and type you specify in the command and whose content is the data between the `{{beginnative}}` and `{{endnative}}` commands) is created. The attachment will be a separate file that the recipient can download from the SecureDocs Web site.

You would attach a document in its native format when you want the recipient to be able to alter the document or when the file must be used in its native format rather than in a graphic format (as with an audio file, whose content could not be represented graphically). For more detailed information on attachments, on the `{{attach}}` command, and on the `{{beginnative}}` command, see the *RightFax InternetLink Module Guide*.

Example FCL for Certified Documents that have Attachments

In the following example, the data generated by your host (“Here are last week’s programs.”) is converted to PDF and becomes the first document listed on the SecureDocs Web site inbox for the recipient. The to-be-attached document (Programs.xls) is left in its native format (a Microsoft Excel file) through the use of the `{{attach native}}` command. It becomes the second file listed on the Web site.

```

{{begin}}
{{type certified}}
{{imagetype pdf}}
Here are last week's programs.
{{attach "c:\\IST Files\\Programs.xls" native}}
{{to las@oswego.com}}
{{subject Weekly programs}}
{{from css@oswego.com}}
{{end}}

```

In the following example, the host data (“Here are last week’s programs.”) is converted to PDF and becomes page 1 of the document that is stored on the SecureDocs Web site. Because the native option of the `{{attach}}` command was not used, Programs.xls is converted to PDF and becomes page 2 of the document.

```
{{begin}}  
{{type certified}}  
{{imagetype pdf}}  
Here are last week's programs.  
{{attach "c:\\IST Files\\Programs.xls"}}  
{{to lss@oswego.com}}  
{{subject Weekly programs}}  
{{from css@oswego.com}}  
{{end}}
```

■ ■ ■

Chapter 3

Sending Documents for Certified Delivery from the RightFax Desktop

When you send a document via certified delivery, the document is sent to your organization's SecureDocs certified delivery Web site where it can be opened and viewed by the recipient. When the document has been viewed, the Web server sends notification back to the RightFax server. Confirmation that any part of the document has been viewed is saved in the fax history. (For information on viewing the fax history, see your RightFax client documentation.)

This chapter explains how to send certified documents using the RightFax desktop applications and the RightFax Web client.

Sending from the RightFax Desktop

The option to send a document for certified delivery is located on the **Fax Information** dialog box. This dialog box can be opened from any of the RightFax desktop applications including FaxUtil, the Quick Fax/Broadcast function on the RightFax tray icon shortcut menu, and the Send to Fax Destination via RightFax function on the Windows Explorer shortcut menu. For information on opening the **Fax Information** dialog box from any of these applications, see the *RightFax Administrator's Guide*.

When you send a document for certified delivery from the RightFax desktop, you must specify an e-mail address for your recipient rather than a fax number. This is because the recipient will be sent an e-mail message that includes a link to the document on your SecureDocs certified delivery Web site.

To send a document for certified delivery

1. From one of the RightFax desktop applications, open the **Fax Information** dialog box.

Figure 3.1 Selecting the Use Certified Delivery Option

The screenshot shows the 'Fax Information' dialog box with the following fields and options:

- To:**
 - Name: Jane Doe (with Phonebook... button)
 - E-mail Address: jdoe@company.com (with Add Entry... button)
 - Voice Number: [Empty field]
 - Company: [Empty field]
 - City/State: [Empty field]
 - Alt. Fax Number: [Empty field]
- Options:**
 - Fine mode
 - Use cover sheet
 - Hold for preview
 - Use smart resume
 - Create PDF image ...
 - Use cheap rates
 - Delay send
 - Time: 1:50:50 PM
 - Date: 7/26/2001
 - Sent
 - Received
 - Pages: [Empty field]
- Accounting:**
 - Account: [Empty field] (with Lookup >> button)
 - Matter: [Empty field]

Buttons: Send, Cancel

2. Under **To**, click the arrow next to **Fax Number** and select **E-mail Address** from the shortcut menu.
3. Enter your recipient's e-mail address.
4. Select the **Use certified delivery** check box.
5. Complete the **Fax Information** dialog box, and then click **Send** to send the document.

Sending from the RightFax Web Client

When you send a document for certified delivery from the RightFax Web client, you must specify an e-mail address for your recipient rather than a fax number. This is because the recipient will be sent an e-mail message that includes a link to the document on your SecureDocs certified delivery Web site.

For information on running the RightFax Web client, see the *RightFax Gateway for Microsoft Exchange, Gateway for Lotus Notes, and Web Client Guide*.

1. Log on to the RightFax Web client.
2. In the Folders list, click the **New Fax** button. This opens the **RightFax Fax Detail** window.

Figure 3.2 Selecting the Enable Certified Delivery Option

Fax Destination Information

Name:

Email: Voice Number:

Enable Certified Delivery Enable PDF Encoding

Company:

City/State:

Account: Matter:

Phonebook Search

Billing Search

3. Under **Fax Destination Information**, click the arrow next to **Fax Number** and select **Email** from the list.
4. Enter your recipient's e-mail address.
5. Select the **Enable Certified Delivery** check box.
6. Complete the **RightFax Fax Detail** window, and then click **Send** to send the document.

Chapter 4

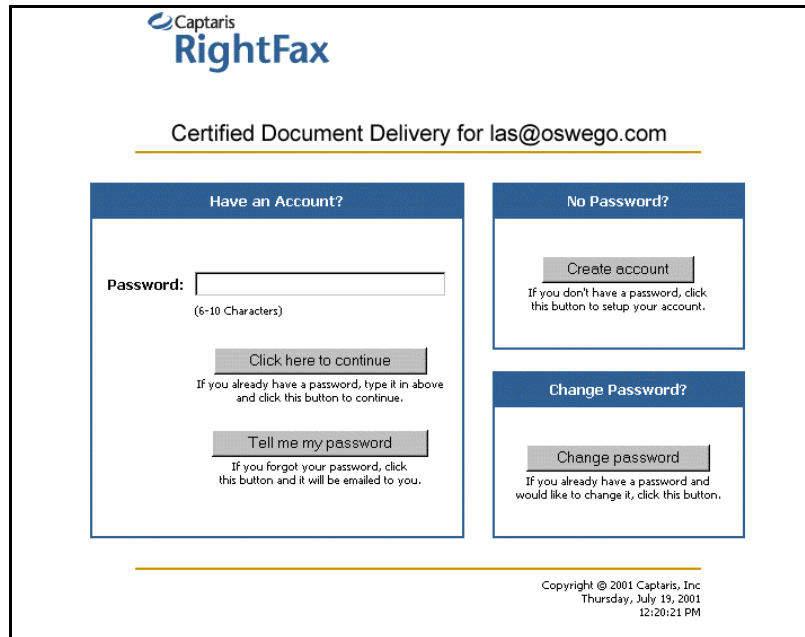
Viewing Documents at the Certified Delivery Web Site

When you send a document for certified delivery, the document is sent to the SecureDocs certified delivery Web site, and the recipient receives an e-mail message that he or she can view the document. This chapter explains what users must do to view certified documents.

To view a certified document at the SecureDocs certified delivery Web site, complete the following steps:

1. Click the link in the certified delivery notification e-mail or type the URL in your Internet browser. The logon page opens in your browser.

Figure 4.1 The Certified Delivery Logon Page



2. Select a logon option:

- If you are a first-time user of the certified delivery Web site, click **Create Account**, and follow the prompts on the screen.
- If you already have a password, enter it in the **Password** box, and click **Click here to continue**.
- If you already have a password but have forgotten it, click **Tell me my password**, and follow the prompts on the screen. The RightFax SecureDocs Module will e-mail your password to you.


3. The inbox appears.

Figure 4.2 The Inbox

Captaris
RightFax

Inbox for las@oswego.com

Click on a document number to see more detailed information.

 Indicates the currently active document.

Read	Document Number	Delete	Sender	Subject	Transmission Time
	PROD1578	<input type="checkbox"/>			Thu Jul 19 05:12:35 2001
✓	PROD1575	<input type="checkbox"/>			Thu Jul 19 05:05:07 2001

Displaying documents 1 through 2 Total Documents 2

Current Page: **1**

Copyright © 2001 Captaris, Inc
Thursday, Jul 19, 2001
12:22:54 PM

4. Click the link to the document in the **Document Number** list, and follow the prompts to download the document.
5. To delete a document from the inbox, select the **Delete** check box, and click **Delete selected documents**.

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Chapter 5

Sending Encrypted Documents

Encrypted documents are password-protected portable document format (PDF) files. You can send these in a desktop environment (such as FaxUtil) or in a production environment (with FCL via the Integration Module).

Sending Encrypted Documents via the Integration Module

To send an encrypted PDF file in a production environment using the Integration Module, use the `{{pdfowner}}` and `{{pdfuser}}` FCL commands. The following table lists the required commands for sending an encrypted PDF.

Table 5A Required FCL Commands for Encrypted PDFs

Command	Description
<code>{{begin}}</code>	Must appear as the first command in an encrypted PDF document; instructs the Integration Module to process all information until an <code>{{end}}</code> command appears. This standard FCL command is described in the <i>RightFax Integration Module Guide</i> .
<code>{{end}}</code>	Must appear as the last command in an encrypted PDF document; instructs the Integration Module to finish processing the information that began with the previous <code>{{begin}}</code> command. This standard FCL command is described in the <i>RightFax Integration Module Guide</i> .
<code>{{from}}</code>	Specifies the sender. This InternetLink FCL command is described in the <i>RightFax InternetLink Module Guide</i> .
<code>{{pdfowner}}</code>	Specifies the owner's (sender's) password for the PDF.

Table 5A Required FCL Commands for Encrypted PDFs

Command	Description
{{pdfuser}}	Specifies the user's (recipient's) password and permission levels for the PDF.
{{subject}}	Specifies the <i>subject</i> line in the e-mail message that is sent. This InternetLink FCL command is described in the <i>RightFax InternetLink Module Guide</i> .
{{to}}	Is the recipient's e-mail address. This InternetLink FCL command is described in the <i>RightFax InternetLink Module Guide</i> .
{{type certified}} or {{type mime}}	With the <i>mime</i> option, the document is sent as an encrypted PDF that is attached to an empty e-mail message. With the <i>certified</i> option, the document is sent to the SecureDocs Web site as an encrypted PDF.

Any information that does not fall between the {{begin}} and {{end}} commands is ignored. The FCL document will be converted to an encrypted PDF with the passwords and permissions specified in the {{pdfowner}} and {{pdfuser}} commands.

Understanding the {{PDF}} Commands

Syntax {{pdfowner <["]ownerpassword["]>}}

Example {{pdfowner "qwerty16"}}

This command specifies a password for the owner of the PDF. In the example, "qwerty16" is the owner's password.

Syntax {{pdfuser <["]userpassword["] [permissions]>}}

Example {{pdfuser "#MNid4" 31}}

This command specifies a password and permissions for the user of the PDF. In the example, "#MNid4" is the user's password, and the user has full permissions.

Note You must set both a user and owner password, and they must be different. If you do not set an owner password, then the PDF can be opened with no password (even if you set a user password). If you do not have different owner and user passwords, then the user will get owner privileges.

Permission is an integer bit-wise value that grants certain permissions for the user. Multiple permissions can be granted, as described in the following table.

Table 5B Bit Values for PDF Permissions

Bit	Permission	Notes
1	Print	The user can print the PDF. Example: <code>{{pdfuser "#MNid4" 1}}</code> The example sets print permissions.
2	Edit	The user can edit the PDF. Example: <code>{{pdfuser "#MNid4" 3}}</code> The example sets print and edit permissions.
4	Select	The user can select text (for copying). Example: <code>{{pdfuser "#MNid4" 7}}</code> The example sets print, edit, and select permissions.
8	Annotate	The user can add annotations. Example: <code>{{pdfuser "#MNid4" 15}}</code> The example sets print, edit, select, and annotate permissions.
16	Save As	The user can save the PDF after making changes. Example: <code>{{pdfuser "#MNid4" 31}}</code> The example sets print, edit, select, annotate, and save as permissions.

Example FCL for Encrypted PDF Documents

In the following example, the host data ("Your account number is 16328182-GRZ") is converted to PDF and is sent to the SecureDocs Web site. The PDF has a password for the owner and user and grants full permissions to the user.

```

{{begin}}
Your account number is 16328182-GRZ
{{type certified}}
{{to las@oswego.com}}
{{subject Weekly programs}}
{{from css@oswego.com}}
{{pdfowner "qwerty"}}
{{pdfuser "#MNid4" 31}}
{{end}}

```

In the following example, the host data (“Your account number is 16328182-GRZ”) is converted to PDF and sent as an attachment to an e-mail message. The PDF has a password for the owner and user and grants user permissions for printing only.

```

{{begin}}

Your account number is 16328182-GRZ

{{type mime}}

{{to las@oswego.com}}

{{subject Weekly programs}}

{{from css@oswego.com}}

{{pdfowner "qwerty"}}

{{pdfuser "#MNid4" 1}}

{{end}}

```

Sending Encrypted Documents from the RightFax Desktop

You can use the SecureDocs Module to format your outbound documents as password-protected portable document format (PDF) files. Password protection ensures that your document can only be viewed by recipients to whom you have provided the required password.

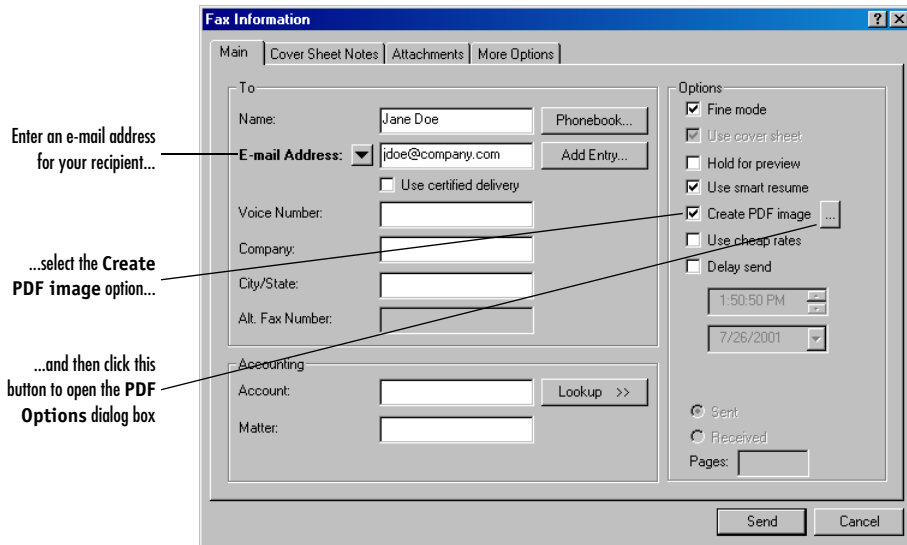
The options to create an encrypted PDF file are located in the **Fax Information** dialog box. This dialog box can be opened from any of the RightFax desktop applications including FaxUtil, the Quick Fax/Broadcast function on the RightFax tray icon shortcut menu, and the Send to Fax Destination via RightFax function on the Explorer shortcut menu. For information on opening the **Fax Information** dialog box from any of these applications, see the *RightFax Administrator's Guide*.

When you send a document from the RightFax desktop as an encrypted PDF file, you must specify an e-mail address for your recipient rather than a fax number. The encrypted PDF file will be formatted in color (if applicable) and the text of the PDF can be selected and edited by the recipient (rich PDF).

To send an encrypted PDF

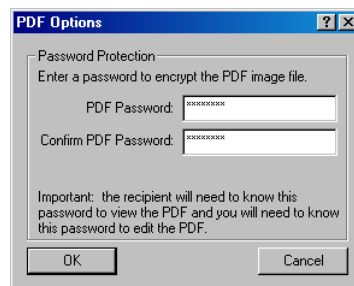
1. From one of the RightFax desktop applications, open the **Fax Information** dialog box.

Figure 5.1 Selecting the PDF Option in the Fax Information Dialog Box



2. Under **To**, click the arrow next to **Fax Number** and select **E-mail Address** from the shortcut menu.
3. Enter your recipient's e-mail address.
4. Select the **Create PDF image** check box.
5. Click the [...] button next to **Create PDF image**. This opens the **PDF Options** dialog box.

Figure 5.2 Creating a Password for Your Encrypted PDF File



6. Type the same password for the PDF file in the **PDF Password** and **Confirm PDF Password** boxes, and then click **OK**. Adobe Acrobat, the program used to view PDF files, will prompt the recipient for this password each time the file is opened.
7. Complete the **Fax Information** dialog box as desired, and then click **Send** to send the document.

Receiving Encrypted Documents

For a recipient to open any PDF file (whether the file is sent with FCL via the Integration Module or from FaxUtil or the RightFax Web Client), he or she must have Adobe Acrobat Reader installed on his or her computer. This application is available for free at the Adobe Web site.

For encrypted PDF files sent via certified delivery, the recipient must log on to the SecureDocs Web site and then download the file. The recipient must enter a password for the PDF file to gain the permissions that you established for the PDF file.

For encrypted PDF files sent via e-mail, the recipient receives the PDF as an attachment to an e-mail message. The recipient must enter a password for the PDF file to gain the permissions that you established for the PDF file.

In either scenario, you need to communicate the password for the PDF file to the recipient. If you do not, he or she will not be able to open the file.

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