



8.5 Document Management Connector Guide

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Introduction

The RightFax Document Management Connector integrates the RightFax client software with DOCS Open® by Hummingbird or iManage™ by NetRight Technologies. DOCS Open and iManage are client/server-based document management and tracking systems.

With the RightFax Document Management Connector users can:

- Fax documents directly from DOCS Open or iManage via the 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, versions 3.7 through 3.9, or iManage DeskSite 6.0 and infoRite, versions 5.0 through 5.2.

Important Licensing Information

Each RightFax Document Management Connector software license allows you to install the connector on 50 client workstations only. Additional licenses can be purchased separately, each allowing an additional 50 client installations.

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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.

The RightFax client applications must be installed on each DOCS Open workstation. Only the RightFax print driver (the tray icon and print-to-fax driver) are required. For more information about these RightFax client applications, refer to the *RightFax Administrator's Guide*.

To install the Document Management Connector for DOCS Open, the RightFax server must be version 8.5 or later. The RightFax Document Management Connector is designed for use with 32-bit client installations of DOCS Open (versions 3.7 through 3.9).

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

Configuring the DOCS Open Server

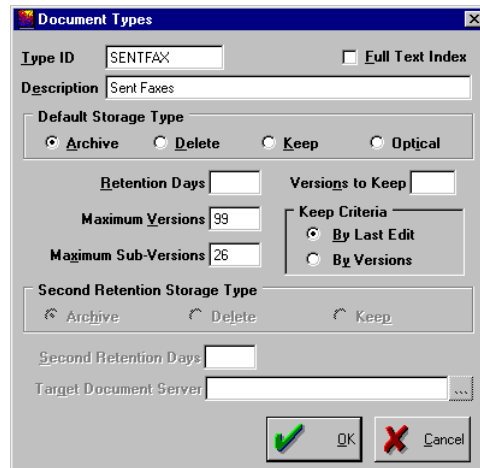
To configure the DOCS Open server

Note These instructions set the Wang™ viewer as the 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 (described in [Appendix A, "Customizing the PCdocs.ini File"](#)).

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.

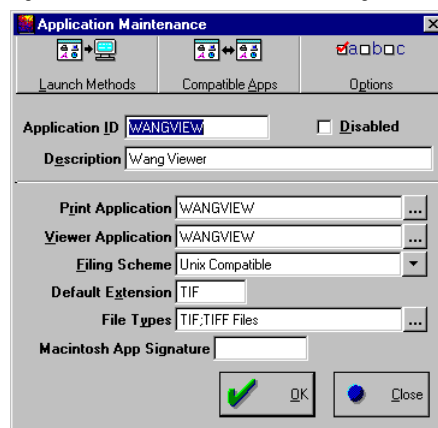
2. Click **New** to open the **Document Types** dialog box.

Figure 1.1 The Document Types Dialog Box



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.

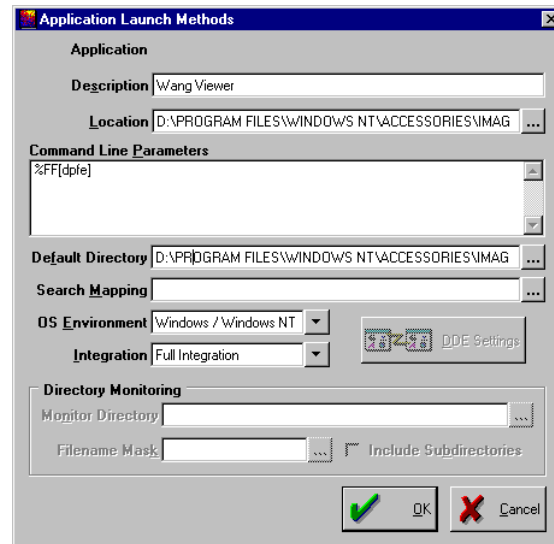
Figure 1.2 The Application Maintenance Dialog Box



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[dpfe]".
- 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 must be installed on the RightFax server. Then, after the connector is installed, you must install the DOCS Open integration on each client workstation.

To install the connector on the RightFax server

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

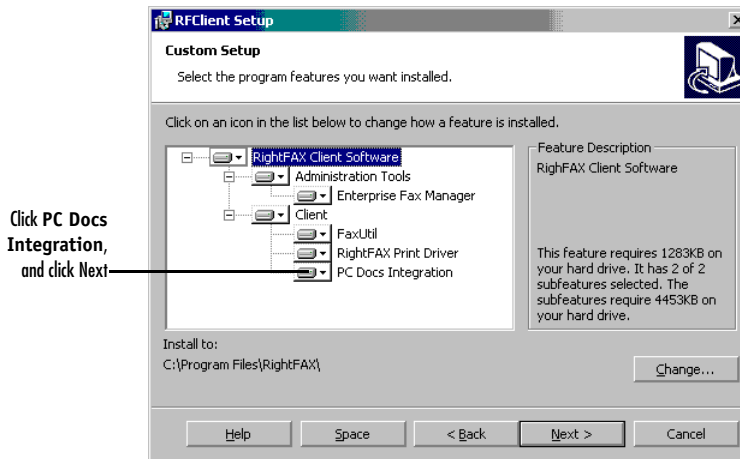
To install the DOCS Open integration on each client workstation

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.

- On the client workstation, open a view of the RightFax\Client\Win32 folder on the RightFax server computer and run Setup.exe.
- 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.

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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.

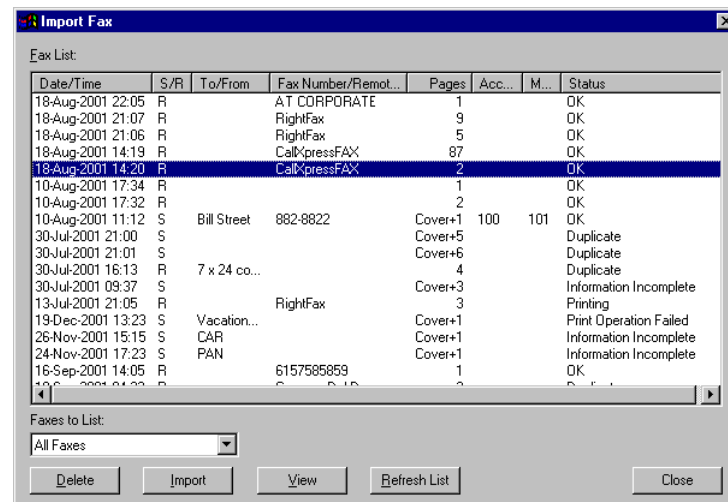
Importing Fax Documents into DOCS Open

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 the 'Document Profile - New Document' dialog box. The fields are filled with the following information:

- 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
- Application:** WANGVIEW
- Retention Schedule:** Type: Archive, Retention Days: 0
- History:** Created: 8/19/01 BDS, Edited: 8/19/01 BDS
- Other options:** Enable Content Searching, Billable

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 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 **Notes** box in the fax.

- 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.

2. 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. If the document contains billing codes, the codes will appear in the **Accounting** boxes.

Figure 2.3 The Fax Information Dialog Box

3. Complete all required 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 open a document in DOCS Open and are working in that document's native application, you can easily fax the document directly from the native application. 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 be stored in the document's history.

Automatic billing code verification

If the document you are faxing contains billing codes, the billing codes appear in the **Fax Information** dialog box in the **Account Code** and **Matter Code** boxes. If you change the billing codes, the Document Management Connector will query DOCS Open and confirm that the new billing codes are valid. If the billing code is not valid, the connector will display the message "Invalid Client/Matter Code."

Document history

When you fax a document from within DOCS Open, the entry "Faxed via RightFax" is added to that document's history in 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 outbound faxes. Each client workstation must be configured individually to access DOCS Open billing codes.

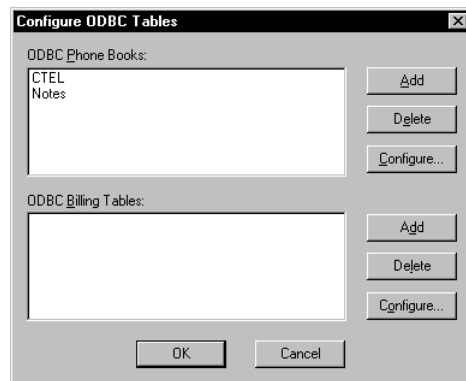
RightFax ODBC configuration

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

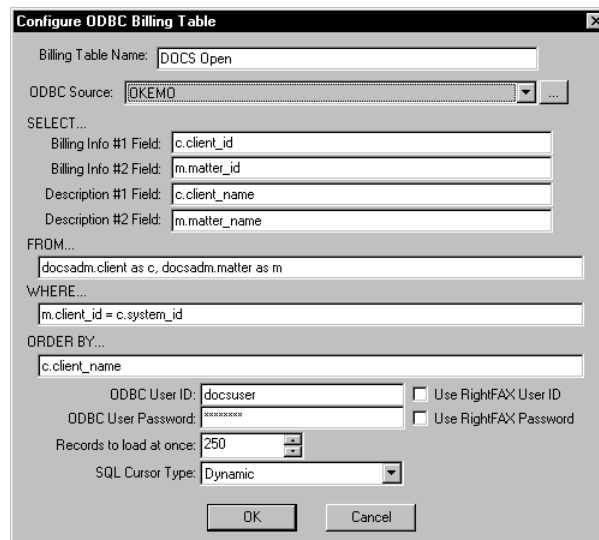
1. Click the RightFax tray icon in the corner of the taskbar to open a shortcut menu. Click **ODBC Configuration**. This opens the **Configure ODBC Tables** dialog box.

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



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.

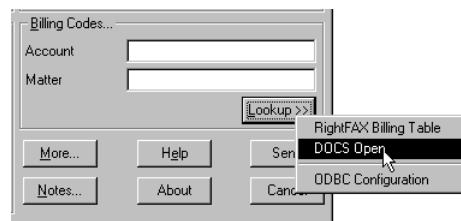
5. Relate the fields of the DOCS Open database to the standard RightFax billing code fields. This is done with an SQL query statement. If the system administrator configured the DOCS Open database with the default settings, these boxes can be filled in exactly as shown in the example (see "Figure 2.5: The Configure ODBC Billing Table Dialog Box" on page 14). 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 when sending faxes.

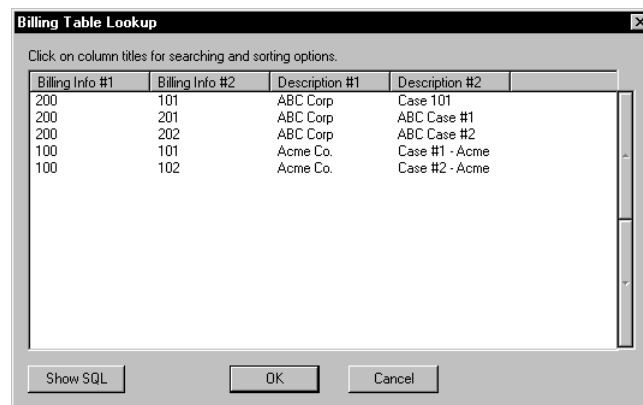
In the RightFax **Fax Information** dialog box, click **Lookup** to select RightFax or DOCS Open billing codes.

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 15), 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.

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Chapter 3

Installing and Configuring the Connector for iManage

The RightFax Document Management Connector for iManage 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 iManage workstation.

The RightFax Document Management Connector is designed for use with iManage DeskSite 6.0 and infoRite versions 5.0 through 5.2. This guide describes installing and using with infoRite.

To install the RightFax 8.5 Document Management Connector for iManage, the RightFax server must be version 8.5 or later.

Installing the Document Management Connector

First, install the Document Management Connector on the RightFax server.

Next, install the RightFax client applications on each workstation. Only the RightFax print driver (the tray icon and print-to-fax driver) is required. For instructions, refer to the *RightFax Administrator's Guide*.

Last, install the iManage integration on each client workstation.

To install the connector on the RightFax server

1. Insert the RightFax Document Management Connector CD 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.

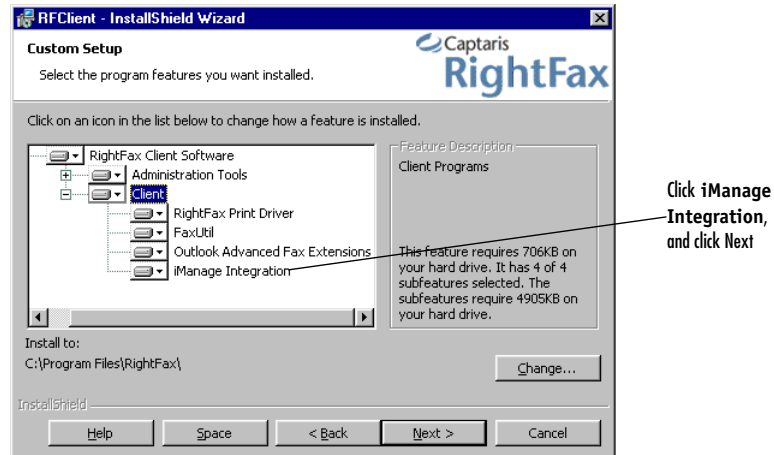
To install the iManage integration on each client workstation

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

1. On the client workstation, open a view of the RightFax\Client\English\Win32 folder (select the language folder for your installation) on the RightFax server computer, 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 iManage 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 on 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 computer.
2. 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 the iManage client application.

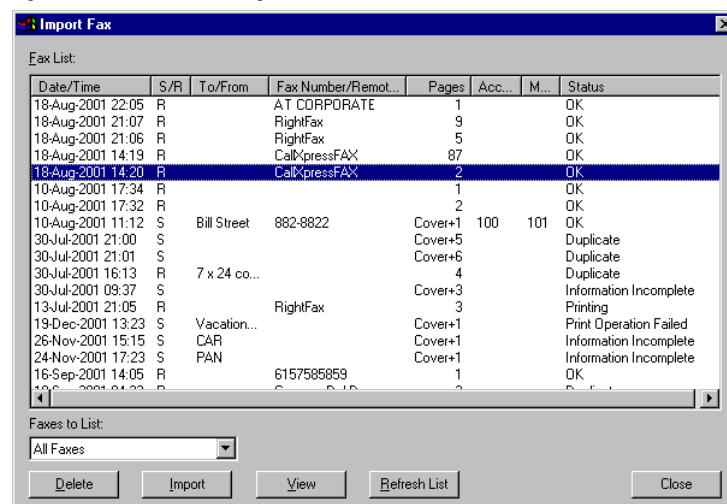
Importing Fax Documents into iManage

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.
2. 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

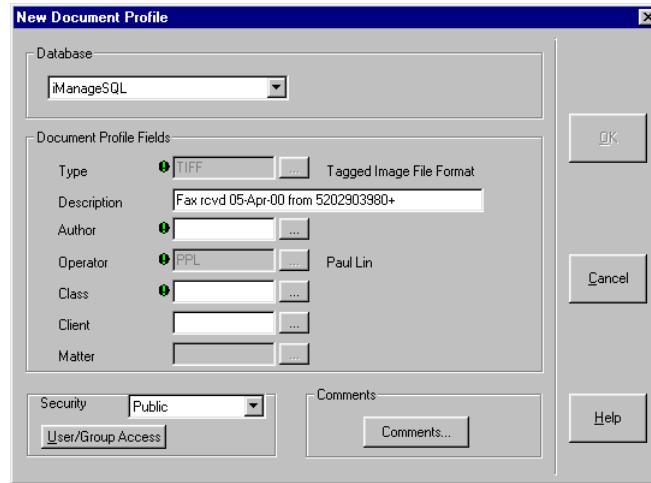


Note You can view or delete any fax from the list by clicking the fax and clicking **View** or **Delete**. Deleting a fax from this dialog box also removes the fax from your RightFax mailbox.

3. 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 fills in the **Description** box and includes the date when the fax was sent or received and information about the destination or origination.

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.

- Complete the remaining boxes, as defined by the iManage system administrator. When you have completed the entries in 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.

- On the **Document** menu, click **RightFax**, and then click **Send Fax**. iManage launches the associated application for the document(s), prints it to the RightFax fax printer, and opens the **Fax Information** dialog box. If the document contains billing codes, the codes will appear in the **Accounting** boxes.

Figure 4.3 The Fax Information Dialog Box

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

Document history

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

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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.

Entry	Description
[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\prtproc s\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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