



8.5 Gateway for Lotus Notes Guide

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Chapter 1

Installing the Gateway for Lotus Notes

The RightFax Gateway for Lotus Notes provides inbound and outbound faxing via RightFax directly from the Notes client application. The RightFax Gateway for Lotus Notes and the Notes client are installed on the RightFax server. Using the Notes client, the gateway logs on to the Domino server, routes incoming faxes as memos to Notes client mailboxes, and picks up fax-bound memos and delivers them to the RightFax server for conversion to fax format and transmission.

The RightFax Gateway for Lotus Notes installs several RightFax-specific databases on the Domino server. One of these databases (Rf80sync.nsf or "EFM Sync") is a mirror of the RightFax database. Because the RightFax database is stored on both servers, RightFax configuration and administration can be performed on either server and then updated periodically on the other.

To install and integrate RightFax with your Lotus Notes system, you need to complete the following basic steps:

1. Install the RightFax server (described in the *RightFax Installation Guide*).
2. Choose the type of integration you want for your RightFax and Notes system (described on page 6).
3. Activate the RightFax Gateway for Lotus Notes (described on page 8).
4. Install the RightFax Gateway for Lotus Notes and the installer database (described on page 8).
5. Use the installer database to install the database files for your RightFax integration (described later in this chapter).
6. Configure the RightFax server document in Notes (described in Chapter 2, "Configuring the EFM Sync Database").
7. Configure the RightFax gateway document in Notes, establishing database synchronization between the RightFax and the Domino servers (described in Chapter 2, "Configuring the EFM Sync Database").
8. Configure RightFax objects in Notes, such as cover sheets and billing codes (described in Chapter 2, "Configuring the EFM Sync Database").
9. Configure users (described in Chapter 2, "Configuring the EFM Sync Database").
10. Create a RightFax public phonebook in Notes (described in Chapter 2, "Configuring the EFM Sync Database").

Upgrading to RightFax 8.5 from another version

For instructions on upgrading to RightFax 8.5 from another version, refer to the RightFax customer support Web site <http://www.rightfax.com/support/>.

Understanding the RightFax and Notes Integration Options

You have the following options for integrating faxing with RightFax in your Notes system. Instructions for each of these options are provided later in this chapter.

Table 1A RightFax Integration Options

Integration option	How users send faxes	Installation features
Full Notes Mail integration	A RightFax mail template for faxes allows Notes users to design and address memos and attachments as outbound faxes.	Locally stores the Notes databases required by the gateway. The databases are moved to the Domino server by automated database copy and replication methods. Adds RightFax forms, subforms, and agents to the Notes mail template that you specify. All mail databases inheriting design from the modified mail template are granted outbound faxing capability. Fax documents are stored both in the RightFax application database and in the user's Notes mail database.
Minimal Notes Mail integration	A RightFax mail template for faxes allows Notes users to design and address memos and attachments as outbound faxes.	Locally stores the Notes databases required by the gateway. These are moved to the Domino server by automated database copy and replication methods. Makes no modifications to any Notes mail template. Modifies each fax user's mail database. Locally installs a fax factory database where fax mechanics reside. For more information on the fax factory database, see "Understanding the fax factory" on page 6 .
No Mail integration	The standard Notes Memo form and RightFax embedded codes (that users type into the body of the memo) allow users to send memos as faxes.	Locally stores the Notes databases required by the gateway. These are moved to the Domino server by automated database copy and replication methods. Makes no modifications to any Notes mail template or any users' mail databases. Fax documents are stored both in the RightFax database and in the user's Notes mail database.

Understanding the fax factory

If you choose minimal Notes Mail integration, RightFax will install fax factory databases that improve the efficiency of the Domino server by moving fax composition tasks to the user's computer. A local fax factory database is installed on each client computer, and a central fax factory template database is installed on the Domino server.

The user's local fax factory database is kept up to date by inheriting its design from the fax factory template. This permits the fax administrator to update the user's fax factory when needed, rather than the Notes mail template.

User-specific data and fax preferences are stored in the User Options document in the EFM Sync database. When a user opens his personal User Options document in his Notes mail database, the current data is pulled into the document from the EFM Sync database. The User Options document is stored in the mail database and has a stored form so that modifications to the database design are not required. When the user saves changes, the data is updated in both the EFM Sync database and the local fax factory database.

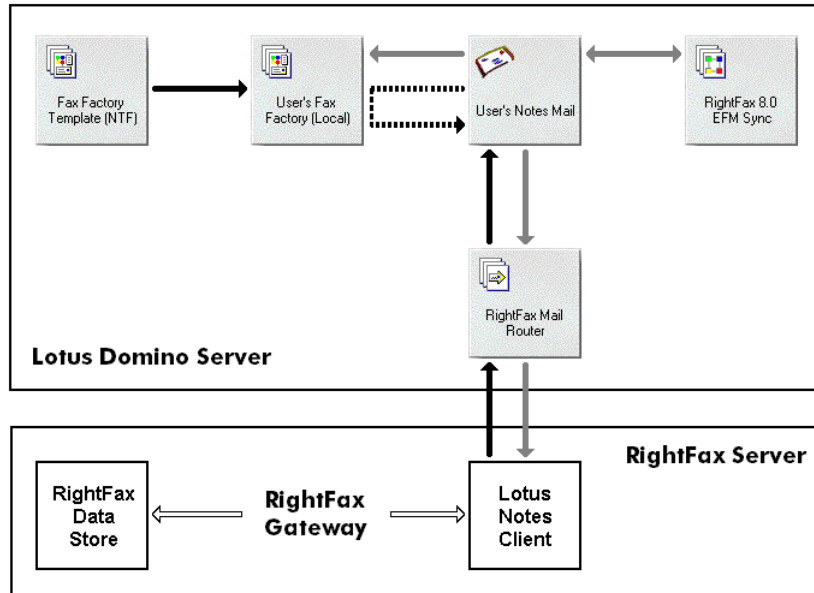
The user composes a fax by activating an agent stored in his mail database. The agent directs composition of the document to the local fax factory database. When saved or sent, the fax is stored in the user's mail database.

Outbound fax documents are delivered via standard Domino mail mechanisms to the database specified in the fax foreign domain document. Fax rendering and delivery out of the Domino

environment are handled by the gateway service on the RightFax server. This frees Domino server resources for Lotus Notes and Domino tasks.

Inbound fax documents are processed by the RightFax gateway on the RightFax server and stored in the RightFax Mail Router database. Faxes are passed from the RightFax Mail Router database to the Domino router task for standard Notes mail delivery. Because delivery is the only task handled by the Domino server, fax traffic only impacts the Domino mail router task.

Figure 1.1 Fax Data Flow



Faxing Notes Forms

For outbound faxes, you can specify that fax images are created using one or both of the following approaches:

- The fax image captures only the contents of the Notes form body field and ignores all other elements of the Notes form. Only the body of the message is faxed.
- The fax image captures the Notes form elements, including the *entire* underlying Notes form (such as headers, graphics, and tables).

Warning If you will be sending faxes with the Notes form elements intact, do not customize the RightFax advanced fax form or customize the Notes memo form for faxing. The forms will not be processed by the gateway.

To configure faxing the entire Notes form, complete the following basic steps:

Install an HP LaserJet 4 print driver on the RightFax server.

During the RightFax database installation, you have the option to select rendering the Notes body field only and rendering the entire Notes form. In the database installer, this is selected in the Configure Fax Rendering Options document. You can select both rendering methods. The database installation is described in this chapter.

When you select Notes form rendering in the Configure Fax Rendering Options document, a documentation database is installed that describes the steps to take to configure Notes form rendering. An icon for the RightFax Forms Printing Setup database (Formprnt.nsf) will be added to the Notes workspace. After you install the databases and before you begin configuring the databases, refer to the RightFax Forms Printing Setup database for further instructions.

Activating the Gateway for Lotus Notes

The files required by the Gateway for Lotus Notes are installed on all RightFax servers during the server installation. However, the Gateway for Lotus Notes must be licensed and activated before gateway functionality will be enabled.

The RightFax Gateway for Lotus Notes is automatically activated on several types of RightFax servers. For these server types, additional steps are not required for activation.

To activate the Gateway for Lotus Notes on other types of RightFax servers, you must have purchased and licensed it. For information on activating new components on the RightFax server, refer to the *RightFax Installation Guide*.

After the Gateway for Lotus Notes has been activated on the RightFax server, you must install the gateway (described in the next section).

Installing the Gateway for Lotus Notes

After you have activated the Gateway for Lotus Notes, you must add the e-mail gateway to the RightFax server computer.

Before you begin, the RightFax e-mail gateway for Lotus Notes requires that your Domino server and client applications all be updated to version 4.6 or later.

Captaris recommends that your Domino server and RightFax server be located on separate computers.

Verify that the Lotus Notes client is installed on the RightFax server and has permissions to access any Domino servers that you want the gateway to access. The Notes client that is used to install RightFax must not be located on the Domino server. If you are installing to an R5 system, you must also have the Notes Designer installed on the RightFax server.

These instructions assume that you have installed the RightFax server and that you have working knowledge of the RightFax server software.

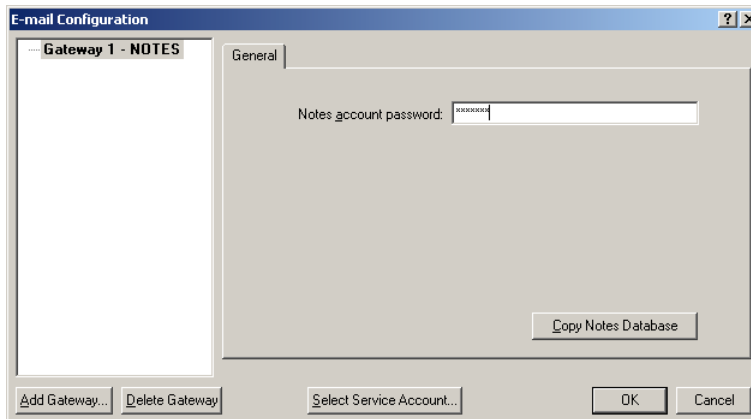
The following process installs the gateway and the installer database. In later steps, you will use the installer database to install the database files for the level of integration you require.

To add the e-mail gateway, use one of the following options:

- Add the gateway for Lotus Notes during the RightFax server installation.
- If you installed the RightFax server and did not add an e-mail gateway during the installation, open the E-mail Gateway configuration program from Windows Control Panel.
- If you already have an e-mail gateway configured and you want to add the Gateway for Lotus Notes, run Enterprise Fax manager and double-click the RightFax E-mail Gateway service. The E-mail Configuration dialog box opens. Click **Add Gateway** and select the type of gateway to add.

When you add the gateway, the E-mail Configuration dialog box opens.

Figure 1.2 The E-mail Configuration Dialog Box

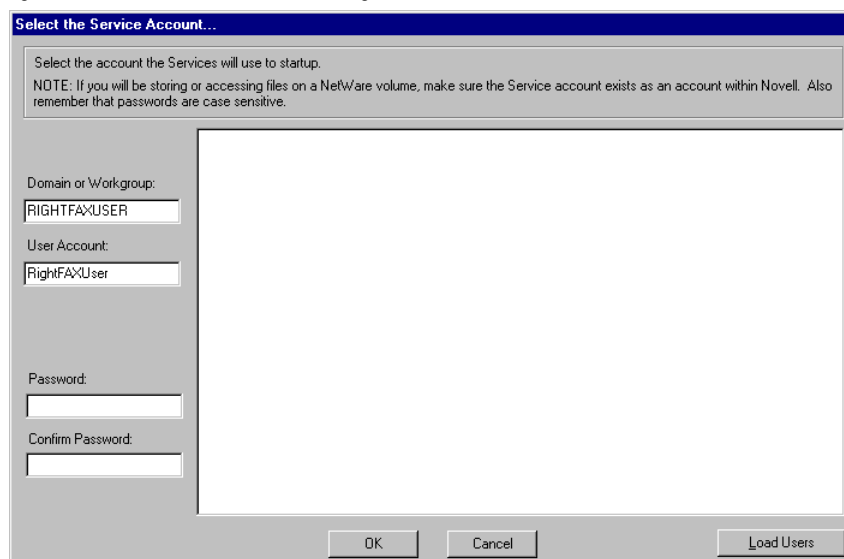


1. In the **Notes account password** box, enter the password for the Notes client that is installed on the RightFax server. You can change this setting at any time in Enterprise Fax Manager.
2. Click **Copy Notes Database**. The Setup program will copy the installer database to the Notes data directory on the RightFax server. Click **OK**.
3. Next, use the installer database to install the RightFax databases in Notes using one of the following options:
 - Full integration with Notes Mail (described on page 10)
 - Minimal integration with Notes Mail (described on page 14)
 - No integration with Notes Mail (described on page 17)
 - Extract the database files and install manually (described on page 19)

Selecting a Service Account for Network Access

The RightFax gateway for Lotus Notes logs on to the network as a service using a Windows user account that you specify. To change the service account, run the e-mail gateway configuration program in Enterprise Fax Manager and click **Select Service Account**. This opens the **Select the Service Account** dialog box.

Figure 1.3 The Select the Service Account Dialog Box



Enter the new service account in the **Domain or Workgroup** and **User Account** boxes. The user account must have administrative rights on the RightFax server. You can also click **Load Users** to browse for a user account on the network. Enter the password for the user account in the **Password** and **Confirm Password** boxes. The password is case-sensitive. Click **OK** to apply the new service account.

Starting and Stopping the Gateway Service

When you install the first e-mail gateway, a new service called the RightFax E-mail Gateway Module is created. This service is set to "Manual" and is started and stopped by the RightFax Server service. You can start and stop the RightFax E-mail Gateway Module service in Enterprise Fax Manager.

Note Logging on to the RightFax server with a Windows NT account that lacks full administrative permissions to the Domino server will cause the Notes gateway service to fail.

Installing the Databases for Full Notes Mail Integration

When you choose to install RightFax for full Notes Mail integration, the following features are enabled:

- A RightFax mail template for faxes allows Notes users to design and address memos and attachments as outbound faxes.
- A RightFax agent can return undeliverable faxes to the senders.
- Notes databases required by the gateway are stored locally on the client computer. The databases are moved to the Domino server by automated database copy and replication methods.
- RightFax forms, subforms, and agents are added to a Notes mail template that you specify.
- All mail databases inheriting design from the modified mail template are granted outbound faxing capability.
- Fax documents are stored both in the RightFax application database and in the user's Notes mail database.

The following configuration process updates all Notes mail users with fax capability. All Notes mail databases that inherit design from the standard Notes mail template will inherit fax capability and RightFax components.

If you want to select users who should receive fax capability, you can create a unique fax mail template for those users *before* installing the RightFax e-mail gateway. For instructions, see ["Selecting users for fax capability" on page 13](#). If you want to select users for fax capability, this fax mail template *must* be created before installing the gateway.

Requirements

The person performing the configuration must have the following access rights:

- Designer in the ACL of the mail template to be modified.
- Editor in the ACL of the NAB.
- Ability to create both new and replica databases on the Domino server connecting to the gateway client.
- Ability to create and modify Group documents in the NAB.
- Ability to create and modify a fax foreign domain document in the NAB.
- Ability to run unrestricted Lotus Script and Java agents on the Domino server that will host the gateway databases.

Each fax user must have:

- Author access in the ACL of the RightFax EFM Sync database on the Domino server.
- Ability to connect to the Domino server EFM Sync database or store local replicas of it and their mail database.
- Lotus Notes Mail or higher license.

To install the databases

1. Run the Notes client on the RightFax server and go to the workspace where RightFax is installed. The Notes client that is used to perform the installation must be on a server that is separate from the Domino server.
2. In the Notes client, open the **RightFax 8.5 Gateway DB Installer**. The **Welcome** document opens. Click **Next**, and the **Stop the RightFax Gateway** document opens.
3. Follow the instructions to stop the e-mail gateway, and then click **Next**.
4. The **Define Installation Type** document opens. Select **New Installation** and **Full Mail Integration**, and click **Next**. The **Define Lotus Configurations** document opens.
5. Verify the version of Notes and the Domino server and the paths to databases and data directories. Click **Next**, and the **Define Database Languages** document opens.
 - With Notes R4, the RightFax user help is available in seven languages. You can install one or all languages.
 - With Notes R5, the RightFax user help, mail template, and EFM Sync database are available in seven languages. You can install one or all languages.
6. Select the language to install, and click **Next**. The **Define Fax Administrative Person or Group** document opens.
7. Specify the person who should have Manager access to the EFM Sync database, and then click **Next**. The **Define Fax Domain** document opens.
8. Specify the foreign domain through which the gateway will route outbound faxes. Click **Next**, and the **Configure Fax Rendering Options** document opens.
9. Select one or both of the following options.

Option	Description
Enable routing of faxes not containing Notes forms	Render outgoing faxes created in Lotus Notes by capturing only the contents of the Notes form body field and ignore all other elements of the Notes form (such as headers, graphics, and tables). RightFax supplements the Notes body field with any specified RightFax elements (such as overlay forms).
Enable routing of faxes containing Notes forms	Render outgoing faxes with the Notes form elements intact; capture the <i>entire</i> underlying Notes form (instead of the body only). When rendering the fax image, RightFax will convert <i>all</i> the captured data to a PCL (printer control language) file, retaining the Notes form elements. When you select this option, you must also specify a foreign domain that will route faxes that contain Notes forms.

Click **Next**, and the **Validate Access to the NAB or Domino Directory** document opens.

10. Verify that you have the permissions to continue this procedure, and then click **Next**. The **Update NAB View Indices** document opens.
11. Click to update each index, and then click **Next**. The **Define Notes Mail Template to Update** document opens.
12. Specify the Notes mail template to modify with RightFax components, its location, and the version of Notes for the template. Click **Next**, and the **Detach Temporary Files** document opens.

13. Click **Next** to detach all the files to a temporary folder. Alternatively, you can detach the files individually. To do so, select the check box **Display the attached core install files**. The files appear, and you can detach one at a time. To view a list of the files in the language you selected or to detach one of the language files individually, click **View Additional Install Files**.
Click **Next**, and the **Create New Server Database Copies** document opens.
14. Click **Next** to create copies of the databases on the RightFax server, and the **Update NAB Mail-in Database Indices** document opens.
15. Click to update each index, and then click **Next**. The **Create New Server Database Replicas** document opens.
16. Click **Next** to create replicas of the databases on the RightFax server. The **Create Notes Mail Template Backup DB** document opens.
17. Click **Next** to create a backup copy of the Notes mail template that will be modified with RightFax components. The **Copy RightFax Components to Notes Mail Template DB** document opens.
18. Click **Next** to copy the faxing components from the RightFax mail template to the Notes mail template that was specified in an earlier step. The **Add Database Icons or Bookmarks** document opens.
19. Select **Yes** to add icons to the Notes Workspace, and then click **Next**. The **Delete Temporary Files** document opens.
20. Select **Yes** to delete the temporary files and folder that were created in an earlier step. Click **Next** to delete the files, and the **Load Design Task** document opens.
21. Follow the instructions to load the template design. Click **Next**, and the **Installation Completed** document opens. Click **Next** to close this document.
22. The gateway will now be running.
 - If you selected Notes form rendering in the Configure Fax Rendering Options document, a documentation database is installed that describes the steps to take to configure Notes form rendering. An icon for the RightFax Forms Printing Setup database (Formprnt.nsf) will be added to the Notes workspace. Before you begin configuring the databases, refer to the RightFax Forms Printing Setup database for further instructions.
 - Configure the gateway and RightFax objects by following the instructions in [Chapter 2, "Configuring the EFM Sync Database"](#).

Files installed by the database installer

The following databases are installed in Notes data folder on the Domino server.

Table 1B Files Installed by the Installer

Database	File name
RightFax 8.5 Admin Help	Rf850ahlp.nsf
RightFax 8.5 EFM Sync	Rf80sync.nsf
RightFax 8.5 User Help	Rf850uhlp.nsf
RightFax Control Database	Rfcontrl.nsf
RightFax Forms Printing Setup databae (if Notes form rendering was <i>not</i> selected)	Formprnt.nsf
RightFax ICD Router	Rf_icd.nsf
RightFax Mail Router	RightFax.nsf
RightFax Mail Router Forms (if Notes form rendering was selected)	Rfaxform.nsf

Selecting users for fax capability

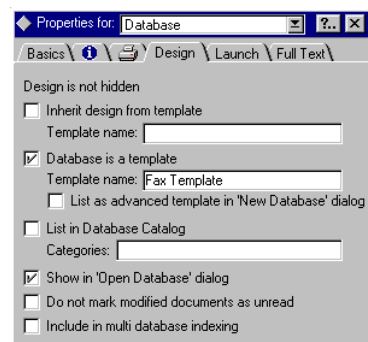
The full Notes Mail integration (page 10) updates all Notes mail users with fax capability. All Notes mail databases that inherit design from the standard Notes mail template will inherit fax capability and RightFax components.

If you want to select users who should receive fax capability, you can create a fax mail template for them *before* installing the e-mail gateway.

To create a fax mail template

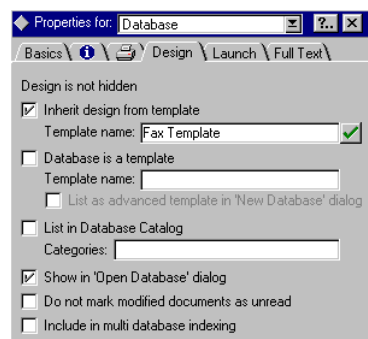
1. On the Domino server, create a *copy* of the standard Notes mail template. This copy is your new fax mail template. Do not create a replica, because modifications made to it will replicate to the original standard Notes template.
2. Add a design template name to the new fax template, as in this example.

Figure 1.4 Adding a New Design Template Name



3. For each Notes mail user who should have fax capability, modify the mail database properties to inherit the design from the new fax template.

Figure 1.5 Inheriting the Notes Template Design



4. Run the RightFax e-mail gateway installation. During the installation, select the fax template rather than the standard Notes mail template.
5. Distribute the new design to all Notes mail users who need fax capability. Use one of the following methods to distribute the design.

To update the design from the Domino server console window

1. At the command prompt, type `Load Design` and press ENTER. Depending on the number of Notes mail users, the process may take several minutes. The process is complete when the prompt **Database Designer Shutdown** appears.
2. Minimize the server console window and return to the Notes client workspace.

To update the design from the Notes client workspace running on the Domino server

1. From the Notes client workspace, on the **File** menu, select **Tools > Administration**.
2. Select the server to administer, and click **Console**. The **Remote Server Console** dialog box opens.
3. In the **Server console command** box, type `Load Design`.
4. Select the **Live console** check box, and then click **Send**. The process is complete when the prompt **Database Designer Shutdown** appears.
5. Click **Done**, and then close the dialog box to return to the workspace.

Installing the Databases for Minimal Notes Mail Integration

When you choose to install RightFax for minimal Notes Mail integration, the following features are enabled:

- Users send and receive faxes from Notes using a local fax factory database, which contains the RightFax form. No modifications are made to any Notes mail template.
- Notes databases required by the gateway are stored locally on the client computer. The databases are moved to the Domino server by automated database copy and replication methods.
- Fax documents are stored both in the RightFax application database and in the user's Notes mail database.
- Fax users can compose and store outbound faxes while disconnected from the Domino server. When they next connect and replicate, these faxes are delivered.

The following configuration process modifies each fax user's mail database by adding an agent, a shared folder, and configuration documents, and it locally installs a fax factory database where fax mechanics reside. These are installed and updated by an automated setup document that is mailed by the fax administrator to each fax user.

Only those users who are mailed a setup document can send faxes.

Note *This method is not recommended for two or more users sharing the same Lotus Notes workspace. A local fax factory is built only for the mail user logged in to the workspace when the RightFax Connections document is activated. As with any Notes mail-enabled database, the fax factory is created with embedded mail user data and signed into the database by the Lotus Notes "sign with mail ID" process.*

Requirements

The person performing the configuration must have the following access rights:

- Editor in the ACL of the NAB.
- Ability to create both new and replica databases on the Domino server connecting to the gateway client.
- Ability to create and modify Group documents in the NAB.
- Ability to create and modify a fax foreign domain document in the NAB.
- Ability to run unrestricted Lotus Script and Java agents on the Domino server that will host the gateway databases.

Each fax user must have:

- Reader access in the ACL of the RightFax EFM Sync database on the Domino server.
- Ability to connect to the Domino server EFM Sync database or store local replicas of it and their mail database.
- Lotus Notes Mail or higher license.

To install the databases

1. Run the Notes client on the RightFax server and go to the workspace where RightFax is installed. The Notes client that is used to perform the installation must be on a server that is separate from the Domino server.
2. In the Notes client, open the **RightFax 8.5 Gateway DB Installer**. The **Welcome** document opens. Click **Next**, and the **Stop the RightFax Gateway** document opens.
3. Follow the instructions to stop the e-mail gateway, and then click **Next**. The **Define Installation Type** document opens.
4. Select **New Installation** and **Minimal Mail Integration**, and click **Next**. The **Define Lotus Configurations** document opens.
5. Verify the version of Notes and the Domino server and the paths to databases and data directories. Click **Next**, and the **Define Database Languages** document opens.
 - With Notes R4, the RightFax user help is available in seven languages. You can install one or all languages.
 - With Notes R5, the RightFax user help, mail template, and EFM Sync database are available in seven languages. You can install one or all languages.
6. Select the language to install, and click **Next**. The **Define Fax Administrative Person or Group** document opens.
7. Specify the person or group of users who should have Manager access to the EFM Sync database, and then click **Next**. The **Define Fax Domain** document opens.
8. Specify the foreign domain through which the gateway will route outbound faxes. Click **Next**, and the **Configure Fax Rendering Options** document opens.
9. Select one or both of the following options.

Option	Description
Enable routing of faxes not containing Notes forms	Render outgoing faxes created in Lotus Notes by capturing only the contents of the Notes form body field and ignore all other elements of the Notes form (such as headers, graphics, and tables). RightFax supplements the Notes body field with any specified RightFax elements (such as overlay forms).
Enable routing of faxes containing Notes forms	Render outgoing faxes with the Notes form elements intact; capture the <i>entire</i> underlying Notes form (instead of the body only). When rendering the fax image, RightFax will convert <i>all</i> the captured data to a PCL (printer control language) file, retaining the Notes form elements. When you select this option, you must also specify a foreign domain that will route faxes that contain Notes forms.

Click **Next**, and the **Define Fax Factory Template Version** document opens.

10. Specify the version of Notes that is installed on the fax client computers.
11. Click **Next**, and the **Validate Access to the NAB or Domino Directory** document opens.
12. Verify that you have the permissions to continue this procedure, and then click **Next**. The **Update NAB View Indices** document opens.
13. Click to update each index. Click **Next**, and the **Detach Temporary Files** document opens.
14. Click **Next** to detach all the files to a temporary folder. Alternatively, you can detach the files individually. To do so, select the check box **Display the attached core install files**. The files appear, and you can detach one at a time. To view a list of the files in the language you selected or to detach one of the language files individually, click **View Additional Install Files**.

Click **Next**, and the **Create New Server Database Copies** document opens.

15. Click **Next** to create copies of the databases on the RightFax server, and the **Update NAB Mail-in Database Indices** document opens.
16. Click to update each index. Click **Next**, and the **Create New Server Database Replicas** document opens.
17. Click **Next** to create replicas of the databases on the RightFax server. The **Add Database Icons or Bookmarks** document opens. Select **Yes** to add icons to the Notes Workspace, and then click **Next**. The **Delete Temporary Files** document opens.
18. Select **Yes** to delete the temporary files and folder that were created in an earlier step. Click **Next** to delete the files, and the **Start the RightFax E-mail Gateway Service** document opens.
19. Follow the instructions to start the e-mail gateway service, and the **Installation Completed** document opens. Click **Next** to close this document.
20. The gateway will now be running.
 - If you selected Notes form rendering in the Configure Fax Rendering Options document, a documentation database is installed that describes the steps to take to configure Notes form rendering. An icon for the RightFax Forms Printing Setup database (Formprnt.nsf) will be added to the Notes workspace. Before you begin configuring the databases, refer to the RightFax Forms Printing Setup database for further instructions.
 - Configure the gateway and RightFax objects by following the instructions in [Chapter 2, "Configuring the EFM Sync Database"](#).

Files installed by the database installer

The following database files are installed in the \Notes\Data\RightFax folder on the Domino server.

Table 1C Files Installed by the Installer

Database	File name
RightFax 8.5 Admin Help	Rf850ahlp.nsf
RightFax 8.5 EFM Sync	Rf80sync.nsf
RightFax 8.5 User Help	Rf850uhlp.nsf
RightFax Control Database	Rfcontrl.nsf
RightFax Fax Factory	Rfactory.ntf
RightFax Forms Printing Setup databae (if Notes form rendering was <i>not</i> selected)	Formprnt.nsf
RightFax ICD Router	Rf_icd.nsf
RightFax Mail Router	RightFax.nsf
RightFax Mail Router Forms (if Notes form rendering was selected)	Rfaxform.nsf

Installing the Databases for No Notes Mail Integration

When you choose to install RightFax with no Notes Mail integration, the following features are enabled:

- Users send and received faxes using the standard Notes Memo form and RightFax embedded codes that users must manually enter into the body of the memo.
- Notes databases required by the gateway are stored locally. These are moved to the Domino server by automated database copy and replication methods.
- No modifications to any Notes mail template or any users' mail databases are made.
- Fax documents are stored both in the RightFax database and in the user's Notes mail database.

Requirements

The person performing the configuration must have the following access rights:

- Editor in the ACL of the NAB.
- Ability to create both new and replica databases on the Domino server connecting to the gateway client.
- Ability to create and modify Group documents in the NAB.
- Ability to create and modify a fax foreign domain document in the NAB.
- Ability to run unrestricted Lotus Script and Java agents on the Domino server that will host the gateway databases.

Each fax user must have:

- An active connection to the Domino server that will host the RightFax gateway databases.
- Lotus Notes Mail or higher license.

To install the databases

1. Run the Notes client on the RightFax server and go to the workspace where RightFax is installed. The Notes client that is used to perform the installation must be on a server that is separate from the Domino server.
2. In the Notes client, open the **RightFax 8.5 Gateway DB Installer**. The **Welcome** document opens. Click **Next**, and the **Stop the RightFax Gateway** document opens.
3. Follow the instructions to stop the e-mail gateway, and then click **Next**. The **Define Installation Type** document opens.
4. Select **New Instalation** and **No Mail Integration**, and click **Next**. The **Define Lotus Configurations** document opens.
5. Verify the version of Notes and the Domino server and the paths to databases and data directories. Click **Next**, and the **Define Database Languages** document opens.
 - With Notes R4, the RightFax user help is available in seven languages. You can install one or all languages.
 - With Notes R5, the RightFax user help, mail template, and EFM Sync database are available in seven languages. You can install one or all languages.
6. Select the language to install, and click **Next**. The **Define Fax Administrative Person or Group** document opens.
7. Specify the person who should have Manager access to the EFM Sync database, and then click **Next**. Click **Next**, and the **Define Fax Domain** document opens.
8. Specify the foreign domain through which the gateway will route outbound faxes. Click **Next**, and the **Configure Fax Rendering Options** document opens.

9. Select one or both of the following options.

Option	Description
Enable routing of faxes not containing Notes forms	Render outgoing faxes created in Lotus Notes by capturing only the contents of the Notes form body field and ignore all other elements of the Notes form (such as headers, graphics, and tables). RightFax supplements the Notes body field with any specified RightFax elements (such as overlay forms).
Enable routing of faxes containing Notes forms	Render outgoing faxes with the Notes form elements intact; capture the <i>entire</i> underlying Notes form (instead of the body only). When rendering the fax image, RightFax will convert <i>all</i> the captured data to a PCL (printer control language) file, retaining the Notes form elements. When you select this option, you must also specify a foreign domain that will route faxes that contain Notes forms.

10. Click **Next**, and the **Validate Access to the NAB or Domino Directory** document opens.
11. Verify that you have the permissions to continue this procedure, and then click **Next**. The **Update NAB View Indices** document opens.
12. Click to update each index. Click **Next**, and the **Detach Temporary Files** document opens.
13. Click **Next** to detach all the files to a temporary folder. Alternatively, you can detach the files individually. To do so, select the check box **Display the attached core install files**. The files appear, and you can detach one at a time. To view a list of the files in the language you selected or to detach one of the language files individually, click **View Additional Install Files**.
- Click **Next**, and the **Create New Server Database Copies** document opens.
14. Click **Next** to create copies of the databases on the RightFax server, and the **Update NAB Mail-in Database Indices** document opens.
15. Click to update each index. Click **Next**, and the **Create New Server Database Replicas** document opens.
16. Click **Next** to create replicas of the databases on the RightFax server. The **Add Database Icons or Bookmarks** document opens. Select **Yes** to add icons to the Notes Workspace, and then click **Next**. The **Delete Temporary Files** document opens.
17. Select **Yes** to delete the temporary files and folder that were created in an earlier step. Click **Next** to delete the files, and the **Start the RightFax E-mail Gateway Service** document opens.
18. Follow the instructions to start the e-mail gateway service, and the **Installation Completed** document opens. Click **Next** to close this document.
19. The gateway will now be running.
- If you selected Notes form rendering in the Configure Fax Rendering Options document, a documentation database is installed that describes the steps to take to configure Notes form rendering. An icon for the RightFax Forms Printing Setup database (Formprnt.nsf) will be added to the Notes workspace. Before you begin configuring the databases, refer to the RightFax Forms Printing Setup database for further instructions.
 - Configure the gateway and RightFax objects by following the instructions in [Chapter 2, "Configuring the EFM Sync Database"](#).

Files installed by the database installer

The following database files are installed in the \Notes\Data\RightFax folder on the Domino server.

Table 1D Files Installed by the Installer

Database	File name
RightFax 8.5 Admin Help	Rf850ahlp.nsf
RightFax 8.5 EFM Sync	Rf80sync.nsf
RightFax 8.5 User Help	Rf850uhlp.nsf
RightFax Control Database	Rfcontrl.nsf
RightFax Forms Printing Setup database (if Notes form rendering was <i>not</i> selected)	Formprnt.nsf
RightFax ICD Router	Rf_icd.nsf
RightFax Mail Router	RightFax.nsf
RightFax Mail Router Forms (if Notes form rendering was selected)	Rfaxform.nsf

Extracting the Install Databases to Prepare for Manual Installation

If you prefer to install the databases manually, you can extract the Notes databases required by the gateway.

For instructions, refer to the RightFax customer support Web site at <http://www.rightfax.com/support/>.

Handling Undeliverable Faxes

If you have installed the *full* Notes Mail integration with RightFax, you can configure Notes to return undeliverable faxes to the senders.

If a fax reaches the RightFax server and the server can't deliver the fax, RightFax generates a fax failure notification. However, if a fax sent from Notes can't be delivered to the RightFax server, the sender won't get notification of the failure. You can configure Notes to return undeliverable faxes to the senders. To do this, you activate an agent in the RightFax Mail Router database.

For each undeliverable fax, the agent creates a "Fax Delivery Failure" report. The agent then mails the report to the fax sender so that the fax can be re-addressed and sent.

To configure the "Handle Undeliverable Faxes" agent

1. Open the **RightFax Mail Router** database.
2. In the **Agents** view, edit the agent **Handle Undeliverable Faxes**.
3. Change the value of **When should this agent run** from **On Schedule Never** to **On Schedule <xxx>**, where <xxx> is the interval at which you would like log maintenance to occur. For Notes version 4.6 and later, the recommended setting is "On Schedule Hourly." For version 5, the recommended setting is "On Schedule More Than Once A Day."
4. Click **Schedule** to further define the log maintenance interval. For Notes version 4.6 and later, the recommended setting is 30 minutes (the minimum interval). For version 5, the recommended setting is 15 minutes or less. (Do not set the interval to 0 hours 0 minutes. This setting disables the agent.)

Schedule the agent so that fax senders will be notified of their undeliverable faxes within a reasonable interval.

5. Save and close the agent. This will re-sign the agent with your signature so that it will run within your organization.
6. In the **Agents** view, select the check box to the left of the **Handle Undeliverable Faxes** agent to enable it.

If this message appears: "Unable to determine the execution access privileges for this agent on <xxx>; agent may not run," then you may not have the appropriate rights to execute the agent. Refer to the online help for administrators in Notes for more information on scheduled agents.

Uninstalling the Gateway

To uninstall the RightFax gateway and databases, complete the following steps:

1. On the RightFax server, run Enterprise Fax Manager and double-click the RightFax E-mail Gateway service. The E-mail Configuration dialog box opens.
2. Select the gateway to remove, and click **Delete Gateway**.
3. Remove all gateway functionality from the Domino server. For instructions, refer to the RightFax customer support Web site at <http://www.rightfax.com/support/>.

■ ■ ■

Chapter 2

Configuring the EFM Sync Database

When the gateway is first installed, the RightFax database is replicated on the Domino server. This mirrored RightFax database, known as “EFM Sync,” lets Notes administrators access and modify RightFax settings from Notes. Database synchronization periodically updates the RightFax or Domino server with the data and configurations from the other.

EFM Sync contains the following information:

- RightFax server and synchronization information
- RightFax e-mail gateway information
- RightFax users and user groups, billing codes, cover sheets, overlay forms, library documents, and phonebooks
- Fax printers
- Status reports of the RightFax server and the e-mail gateway
- Logs of sent and received faxes processed on the RightFax server
- RightFax agents

The interprocess communication document (ICD) is a small document that is generated when any of the gateway “on-demand” functions are activated. The ICD is delivered to the RightFax ICD Router database, where the gateway collects it. The gateway performs immediate action to fulfill the instructions contained in the ICD. For example, ICD processing allows immediate, on demand database synchronization.

After you have installed the RightFax database files (described in [Chapter 1, “Installing the Gateway for Lotus Notes”](#)), you configure the EFM Sync database to meet your needs. You should complete the following basic steps:

1. Verify that you have access to EFM Sync ([described on page 22](#)).
2. Configure the RightFax server document in Notes, establishing database synchronization between the RightFax and the Domino servers ([described on page 22](#)).
3. Configure the RightFax gateway document in Notes ([described on page 26](#)).
4. Configure RightFax objects in Notes, such as cover sheets and billing codes ([described on page 32](#)).
5. Configure default user settings and import users from the Notes address book ([described on page 32](#)).
6. If needed, configure users to receive e-mail notifications of received faxes via Notes ([described on page 37](#)).
7. If needed, create a RightFax public phonebook in Notes ([described on page 38](#)).

Understanding EFM Sync Database Security

During the initial gateway installation, the person logged on to Notes for the installation is assigned Notes Manager access rights to EFM Sync. This person must log on in order to complete the installation or to assign Manager access to other users.

Except for phonebook entries, changes to the EFM Sync database can be made only by RightFax administrators.

During the gateway installation (described in [Chapter 1, "Installing the Gateway for Lotus Notes"](#)), a RightFax administrative group is created in the Notes Public Address Book. Any Notes users in the RightFax administrative group can grant or deny access to other users. Add or remove Notes users to this group to grant or deny access to EFM Sync. Members of this group must have Notes Manager access rights to EFM Sync.

To make changes to the EFM Sync database, members of this group must also be assigned administrative rights in RightFax. To create RightFax administrators, see ["Creating RightFax administrators" on page 36](#).

Configuring the RightFax Server

When you install the RightFax databases, server information is specified in the Fax Server document in the EFM Sync database.

Understanding database synchronization

The RightFax e-mail gateway for Lotus Notes synchronizes the Notes and RightFax databases. When the gateway is first installed, the RightFax database is replicated on the Domino server. This mirrored RightFax database, known as "EFM Sync," lets Notes users access and modify RightFax settings and configuration options from directly within Notes. Database synchronization periodically updates either the RightFax or the Domino server with the database configuration from the other.

Synchronization is one directional: RightFax-to-Notes or Notes-to-RightFax. During synchronization, new documents and changes to existing documents are copied from the source server to the destination server, but data is never copied back from the destination server to the source server.

Warning *After synchronization is set up, modifications to RightFax database settings should be made on the source database only (the database on the Domino server, by default). Changes made on the destination server will be overwritten the next time synchronization occurs.*

The EFM Sync database can be configured for full or selective replication. Full replication maintains a mirrored replica of the database across two or more servers. Selective replication is most often used to maintain a local replica of the database, such as on a laptop. The EFM Sync database is installed with full database replication, and you can enable selective replication. To enable selective replication, see ["Managing database replication" on page 25](#).

Because a large part of the database consists of logs of gateway server operations, you can control the size of the database by managing the logs. You can:

- Limit the amount of information recorded in the logs.
- Limit the number of log documents to save.
- Limit the age of log documents to save.

You also can increase the size limit of the database. To manage the log documents, refer to the topics on managing logs in the online help for RightFax administrators in Notes.

Enabling database synchronization

When you first install the e-mail gateway for Lotus Notes, all database synchronization is disabled. Only Notes users with Manager access to the EFM Sync database can enable or disable synchronization.

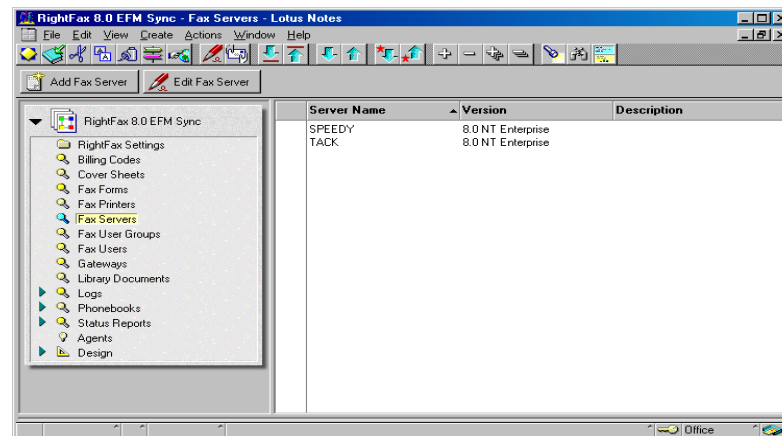
RightFax recommends that you enable synchronization after you:

1. Evaluate the database objects that you will maintain in RightFax or in EFM Sync (such as users and billing codes).
2. Define the data in RightFax or in EFM Sync.
3. Determine the synchronization path for each object (from RightFax to EFM Sync, or from EFM Sync to RightFax).

To configure the server document

1. In Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view. Open the **Fax Servers** view. A list of your RightFax servers appears in the view.

Figure 2.1 The EFM Sync Fax Servers List



2. Double-click a listed server to open the Fax Server document. Click **Edit Fax Server**.

Figure 2.2 The Fax Server Document



3. Under **Basics**, the server name and version appear.

Table 2A Basic Server Information

Field	Setting
Synchronization	Select the check box to enable synchronization.
Synchronization Interval	Enter the frequency you want synchronization between the Domino and RightFax servers to occur. A setting of eight hours is recommended.
Synchronization Logging	Specify the level of information that will be written to the Synchronization Log: <ul style="list-style-type: none"> ▶ None. Records the date and time of the synchronization and the result. ▶ Terse (recommended). Records the success or failure of the synchronization process. ▶ Normal. Records details that make it useful to the average RightFax user. ▶ Verbose. Records details that make it useful to the RightFax administrator. ▶ Debug. Records all details. This option dramatically increases the size of the EFM Sync database. Select this option if you are initially testing the synchronization, if you are experiencing synchronization failures, or if you require details significant to a RightFax customer support engineer. For a description of the log, see "RightFax Event Logs" on page 51.

Table 2A Basic Server Information (continued)

Field	Setting
Synchronization Prescan Agent	The name of any Lotus Notes agent that should run prior to the synchronization.
Synchronization Postscan Agent	The name of any Lotus Notes agent that should run following the synchronization. The default is "Initialize User Notes ID from User Name." This assures that new fax users added to the EFM Sync database from RightFax are given Notes IDs in their fax user documents. The IDs are based on the User Name field in the fax user document, e.g., John Smith = JOHN_SMITH.
Status Monitoring	Select the check box to enable writing fax server status documents in the EFM Sync database.
Status Interval	The amount of time between the end of one status monitoring cycle and the beginning of the next. The status monitoring feature continually overwrites one status document. This means that you can set a very short interval without risk of the database size reaching its quota. The recommended setting is 60 seconds.

4. Under **Fax Objects to Synchronize**, enable each RightFax object that you want to synchronize. For each object enabled, specify the synchronization method: RightFax to Notes or Notes to RightFax.
5. Under **Fax Servers to Synchronize**, specify the RightFax servers to which you want to synchronize each RightFax object.
6. Under **Image Files to Synchronize**, specify whether you want to synchronize the cover sheet and library document image files *in addition* to the object IDs. This will copy the cover sheet or library document files from the RightFax server to the Domino server during synchronization. If you select either of these options, you must also specify a folder on the Domino server in which to store the files.
7. Under **Fax Server Directories**, paths and data folders on the RightFax server appear.
8. Under **Comments**, enter any comments you may need as documentation.
9. Click **Save and Close** to save your synchronization settings and return to the EFM Sync database.

Managing database replication

The EFM Sync database can be configured for full or selective replication. Full replication maintains a mirrored replica of the database across two or more servers. Selective replication is most often used to maintain a local replica of the database, such as on a laptop.

Selective replication limits the amount of disk space required for the database, and the replication sessions can be kept short. A selective replication is smaller because it excludes log documents.

The EFM Sync database is installed with full database replication, and you can enable selective replication.

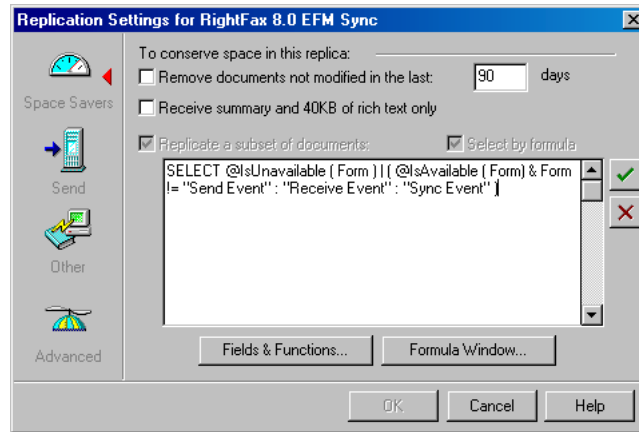
To enable selective database replication

1. In Notes, right-click the **EFM Sync** icon to open a shortcut menu.
2. In Notes 4.x, select **Replication Settings**. In Notes 5.x, select **Replication**, and then **Settings**. The **Replication Settings** dialog box opens with the **Space Savers** settings in view.
3. Select the check box **Replicate a subset of documents**.

4. Select the check box **Select by formula**, and in the formula window create the following formula:

```
SELECT @IsUnavailable ( Form ) | ( @IsAvailable ( Form) & Form != "Send
Event" : "Receive Event" : "Sync Event" )
```

Figure 2.3 EFM Sync Replication Settings



This formula excludes all log documents from replication. You can specify the documents you want to exclude from the replication.

5. Click **OK** to save the settings.

Configuring the RightFax Gateway Document

The RightFax e-mail gateway for Lotus Notes monitors the RightFax mail router database for outgoing faxes and interprocessing communication documents (known as “ICD documents”). In return, the RightFax mail router monitors the Notes mail server for faxes and ICD documents.

ICD processing allows immediate, on-demand database synchronization.

Understanding ICD processing

The interprocess communication document (ICD) is a small document that is generated when any of the gateway "on-demand" functions are activated. The ICD is delivered to the RightFax ICD Router database, where the gateway collects it. The gateway performs immediate action to fulfill the instructions contained in the ICD.

For example, the Process Outbound action in the gateway document will process outbound fax documents regularly according to the configured interval. However, there may be times when it is crucial that the outbound faxes collected in the RightFax Mail Router database be processed as quickly as possible. Invoking the Process Outbound action composes an ICD with instructions commanding the gateway to process all outbound faxes. The ICD is delivered to the RightFax ICD Router database via Domino mail. The gateway collects the ICD, reads the instruction, and runs the outbound processes. Finally, the gateway resets the interval clock so that outbound documents will next be processed at the end of the configured interval.

Be aware that, as with all gateway processes, the ICD process has an interval between when it completes its last task and when it scans the ICD Router database for new ICD messages. For example, an on-demand action such as Process Outbound causes the sequence of events in the following example.

Assume that the interval for ICD processing is 45 seconds and the interval for processing outbound faxes is one minute.

1. A user selects Process Outbound from within the Gateway document in the EFM Sync database.
2. An ICD with the instruction Process : Outbound is created in the background by LotusScript.
3. The ICD is mailed to the ICD Router database.
4. When the ICD processing interval clock has counted down to 0, the gateway scans the ICD Router database.
5. The gateway finds the ICD.
6. The gateway processes the ICD by scanning the RightFax Mail Router database for outbound documents.
7. Any documents found are delivered out of Domino to the RightFax server.
8. The outbound fax processing interval is reset to one minute and begins counting down to 0.
9. The ICD processing interval clock is reset to 45 seconds and begins counting down to 0.

In this example there is a potential lag of up to 45 seconds between the time when the Process Outbound action is invoked and the time when the ICD is read and outbound faxes are processed. For this reason, it is recommended that you configure ICD processing with a brief interval. Since ICDs are routed to a different database from regular fax traffic, the ICD processing task can require almost no time to complete when the ICD router is empty, so you can configure ICD processing for a shorter interval than you might for other intensive fax processes. Even a setting of 15 seconds will not tax regular fax processes because for the majority of time the ICD router database will be empty.

Faxing Notes forms

For outbound faxes, you can specify that faxes images are created using one or both of the following approaches:

- The fax image captures only the contents of the Notes form body field and ignores all other elements of the Notes form (such as headers, graphics, and tables).
- The fax image captures the Notes form elements, including the *entire* underlying Notes form (instead of the body only).

If you will be sending faxes with the Notes form elements intact, do not customize the RightFax fax form or customize the Notes memo form for faxing.

To configure the gateway document

1. In Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view. Open the **Gateway** view. A list of your RightFax e-mail gateways appears in the view.
2. Double-click a listed gateway to open the Gateway document. Click **Edit Gateway**.
3. Under **Basics**, information about the e-mail gateway is provided by the gateway.

4. Under **Interprocess Communication Document Processing**, specify the following settings,

Table 2B Settings for ICD Processing

Field	Setting
Enabled	Select the check box to activate interprocess communication document (ICD) processing.
Interval	Enter the interval at which the gateway should monitor the ICD router database. A setting of 15 seconds is recommended.
Logging	<p>Specify the level of status information that will be written to the ICD router database.</p> <ul style="list-style-type: none"> ▸ None. Records the date and time the fax was submitted. ▸ Terse (recommended). Records the success or failure of the delivery of the ICD. ▸ Normal. Records details that make it useful to the average RightFax user. ▸ Verbose. Records details that make it useful to the RightFax administrator. ▸ Debug. Records all details. This option dramatically increases the size of the EFM Sync database. <p>The ICD status can be monitored in the ICD router database messages view.</p>
Notes Mail Server	Select the Notes mail server where ICD documents are routed.
Router Database	Select the file name where the ICD router database is located (usually in the Notes Mail database.)

5. Under **Receive Inbound Faxes**, specify the following settings.

Table 2C Settings for Inbound Faxes

Field	Setting
Enabled	Select the check box to receive inbound faxes.
Interval	Enter the interval at which the gateway should check the RightFax server for inbound faxes.
Logging	<p>Specify the level of information that will be written to the Fax Receive Log.</p> <ul style="list-style-type: none"> ▸ None. Records the date and time the fax was received and the result. ▸ Terse (recommended). Records the success or failure of the received fax. ▸ Normal. Records details that make it useful to the average RightFax user. ▸ Verbose. Records details that make it useful to the RightFax administrator. ▸ Debug. Records all details. This option dramatically increases the size of the EFM Sync database. Select this option if you are initially testing the synchronization, if you are experiencing synchronization failures, or if you require details significant to a RightFax customer support engineer. <p>For a description of the log, see "RightFax Event Logs" on page 51.</p>
Notes Mail Server	Select the Notes mail server where faxes should be sent.
Router Database	The name of Notes mail router database where the gateway sends faxes.
Prescan Agent	The name of any Lotus Notes agent that you would like the gateway to run prior to each cycle of checking for received faxes in the mail router database.

Table 2C Settings for Inbound Faxes (continued)

Field	Setting
Postscan Agent	The name of any Lotus Notes agent that you would like the gateway to run immediately after each cycle of checking for received faxes in the mail router database.
New Fax Subject Line	When a fax is received, this text can be displayed in the subject field of the Notes message that notifies the recipient. The notification message can contain a combination of text and variables. The default is "A new <FAX_NUMPAGES> page fax has arrived from <FAX_CSID>". FAX_NUMPAGES = The number of pages received. FAX_CSID = The sender's caller subscriber ID (CSID).
New Fax From Line	When a fax is received, this text can be displayed in the sender field of the Notes message that notifies the recipient. The notification message can contain a combination of text and variables. The default is "Fax Server <FAXSERVERNAME>". FAXSERVERNAME = The name of the fax server.
Include Original Subject in Completed Fax Notification	The notification to the sender will include the subject line of the sent fax.
Source for Fax Header Image	The header of the message containing an inbound fax can include data about the receipt, such as the name of gateway and the receipt time. The template for this data can be an .rtf file or a Notes form.
Process Fax Body	By default, received fax images are attached to Notes mail messages. To view the fax, the recipient must select the image and open it. You have the following options: <ul style="list-style-type: none"> ▸ To attach fax images, select Attach Fax Images. ▸ To embed the image in the message so that it can be viewed within the message without opening it, select Embed Fax Images. ▸ To embed and attach fax images, select Embed and Attach Fax Images.
Fax Images to Embed	If fax images will be embedded in the Notes message body, you have the following options: <ul style="list-style-type: none"> ▸ To embed the first page of the image in the mail message, such as the cover page, select First Page. ▸ To embed all the fax page images in the mail message, select All Pages.
Size of Embedded Fax Images	Select the proportionate size for fax images that will be embedded in Notes mail messages rather than attached.
Attach History	To attach a text file that contains the transmission history to each received fax, select Yes .

6. Under **Send Outbound Faxes**, specify settings that affect outbound faxes. You can establish separate settings for:
- Faxes created in Notes that captured only the contents of the Notes form body field and ignored all other elements of the Notes form (such as headers, graphics, and tables).
 - Faxes created with the Notes form elements intact, capturing the *entire* underlying Notes form (instead of the body only).

Table 2D Settings for Outbound Faxes

Field	Setting
Enabled	Select the check box to send outbound faxes.
Interval	Enter the frequency you want the gateway to check the Notes mail server for outbound faxes. The recommended setting is 60 seconds.
Logging	<p>Specify the level of information that will be written to the Fax Send Log.</p> <ul style="list-style-type: none"> ▸ None. Records the date and time the fax was sent and the result. ▸ Terse (recommended). Records the success or failure of the sent fax. ▸ Normal. Records details that make it useful to the average RightFax user. ▸ Verbose. Records details that make it useful to the RightFax administrator. ▸ Debug. Records all details. This option dramatically increases the size of the EFM Sync database. Select this option if you are initially testing the synchronization, if you are experiencing synchronization failures, or if you require details significant to a RightFax customer support engineer. <p>For a description of the log, see "RightFax Event Logs" on page 51.</p>
Notes Mail Server	Select the Notes mail server where the gateway mail router database resides.
Router Database	The name of the Lotus Notes mail router database where the named gateway sends faxes.
Prescan Agent	The name of any Lotus Notes agent that you would like the gateway to run prior to each cycle of delivering faxes out of the mail router database.
Postscan Agent	The name of any Lotus Notes agent that you would like the gateway to run immediately after each cycle of delivering faxes out of the mail router database.
Export Method	<p>If faxes will consist of the contents of the Notes body field only, select Microsoft Word RTF as the method of export.</p> <p>If faxes will include the Notes form elements, select one of the following options:</p> <ul style="list-style-type: none"> ▸ Notes Native Export. RightFax converts the message to fax format using the native Notes export process. The process runs in the background and does not use the Notes client. This option cannot be used with Notes 5.03 and 5.04. ▸ Notes Client Print Processing. On the RightFax server, the Notes client print process is used to convert a message to fax format. This process is slower than the native Notes export process.
Export Page Size	Determines the page size for the fax. This option is not available for Notes Client Print Processing.
Notes Client Print Timeout	If using Notes Client Print Processing, this setting establishes a time limit for the Notes client on the RightFax server to convert the Notes message to fax format. After this time limit, RightFax will close the Notes client. It assumes that Notes is not working or is waiting for user interaction that has not been received.
Notes Client Print Throttle	Select the interval to run the Notes Client Print Process.

Table 2D Settings for Outbound Faxes (continued)

Field	Setting
Notes Client Print Cleanup	If using Notes Client Print Processing, this setting determines when the Notes client will be closed and opened to clean up Notes processes on the RightFax server.
Unknown Originator	Determines how to handle an outbound fax when the sender has no User Options document in the EFM Sync database: <ul style="list-style-type: none"> ▸ Do not send. Abandons the fax and sends a failure message to the sender. ▸ Send using default user. Retrieves settings and data from the default user document in the EFM Sync database. ▸ Create user record. Retrieves settings and data from the default user document in the EFM Sync database, and creates a new fax user record based on the defaults.
Delete Sent Faxes from Router	Select the check box to have the gateway delete the fax document from the mail router database after the fax is successfully sent.
Force Notification to Always	Select the check box to override the sender's notification setting in the User Options document, thus always sending a notification for faxes sent through this gateway.

7. Under **Real-Time Fax Status**, you can activate real-time fax status reporting. You can establish separate settings for:
- Faxes created in Notes that captured only the contents of the Notes form body field and ignored all other elements of the Notes form (such as headers, graphics, and tables).
 - Faxes created with the Notes form elements intact, capturing the *entire* underlying Notes form (instead of the body only).

Table 2E Settings for Real-Time Fax Status

Field	Setting
Real-Time Fax Status	Select the check box to activate real-time fax status reporting.
Append Cover Page to Log	Select Yes to include cover pages in the real-time fax status report. This will increase the size of the report and the EFM Sync database. Select If Needed to append cover pages for: <ul style="list-style-type: none"> ▸ Faxes held for preview. ▸ Faxes that require approval.
Append Body Images to Log	Select Yes to include body pages of sent faxes in the real-time fax status report. This will increase the size of the report and the EFM Sync database. Select If Needed to append cover pages for: <ul style="list-style-type: none"> ▸ Faxes held for preview. ▸ Faxes that require approval.
Append History to Log	Select Yes to include the history of each sent fax in the real-time fax status report. This will increase the size of the report and the EFM Sync database.
Delete Completed Faxes	You can specify whether or not to delete completed faxes from the real-time fax status report after the faxes are successfully sent. <ul style="list-style-type: none"> ▸ Select None to never delete faxes from the report. ▸ Select Successful Only to delete only faxes that are successfully sent. ▸ Select All to delete all faxes from the report.

8. Under **Outbound Conversion Defaults**, specify document conversion defaults for Microsoft Excel, Microsoft PowerPoint, and Visio documents. The password you enter in the **Password** box will be used when RightFax attempts to open a password-protected file for server-side application conversion.

Configuring RightFax Objects in Notes

EFM Sync is a mirror of the RightFax database. If you are synchronizing RightFax to Notes, you should configure the RightFax objects in the RightFax administration utility, Enterprise Fax Manager.

To configure the objects in Notes, double-click the **EFM Sync** icon to open the **EFM Sync** database. Double-click each of these documents to view, add, and edit the RightFax objects in the following sequence:

1. Cover sheets
2. Fax overlay forms
3. Fax printers
4. Billing codes
5. Library documents
6. Fax user groups

Because EFM Sync is a mirror of the RightFax database, each of these documents includes the same settings that appear in Enterprise Fax Manager. For a description of the settings for these objects, please refer to the appropriate chapter of the *RightFax Administrator's Guide*.

Adding and Configuring Users

During the initial installation of RightFax with your Notes system, you must add users to the EFM Sync database. Complete the following steps:

1. Configure the connections document ([described on page 32](#))
2. Configure default user settings ([described on page 33](#))
3. Import users from the Notes Address Book ([described on page 33](#))
4. Create routing codes ([described on page 35](#))
5. Set up fax administrators ([described on page 36](#))
6. If installing RightFax for full Notes Mail integration, run the Load Design task ([described on page 36](#))

To begin in Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view. Open the **Fax Users** view.

Configuring the connections document

1. In the **Fax Users** view, click the **Connections** action button.
2. Under **Automated Options**, choose one or both of the following options:
 - **Hide Connections from Users.** Select this option to hide the information in the connections document from users.
 - **Update Fax Factory DB.**
3. Under **Database Connections**, you can review and verify the paths to data folders, databases, and templates.
4. Under **Available Fax Domains**, select the foreign domains that will be used for sending faxes.
5. Click **Save and Close** to save the connections document.

During initial installation, when users are imported from the Notes address book (in a later step), the connections document will be automatically mailed.

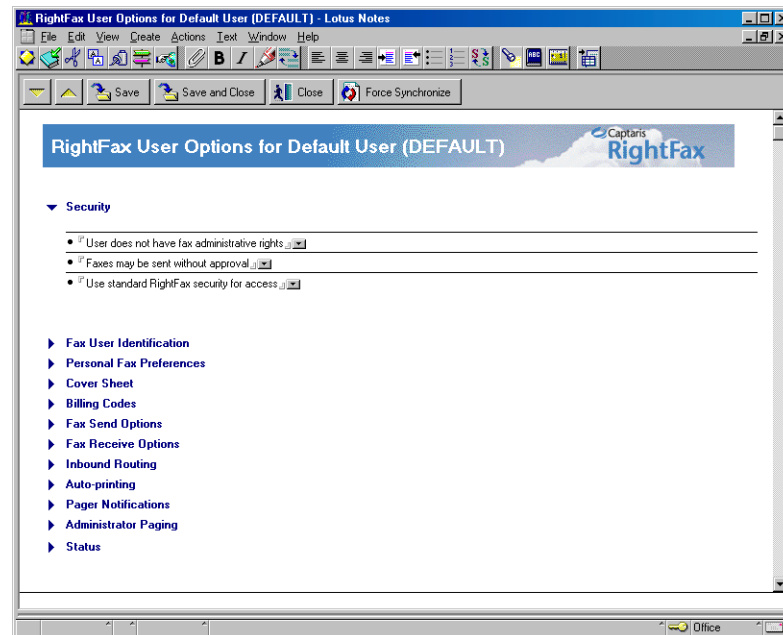
The **Mail Connections Document** button is for later use in the following circumstances:

- If a user deletes the Connections document by mistake.
- If changes are made to the Connections document by the RightFax administrator (for example, if a new server is added and databases are moved.)

Configuring default user settings

1. In the **Fax Users** view, click the **Default User** action button.
2. Because EFM Sync is a mirror of the RightFax database, each of these documents includes the same settings that appear in Enterprise Fax Manager. For a description of the settings for these objects, please refer to the appropriate chapter of the *RightFax Administrator's Guide*.

Figure 2.4 RightFax Default User Settings



Importing users from the Notes Address Book

During the initial installation, you should import users to the EFM Sync database from the Notes Address Book, and then you should synchronize the users to the RightFax server. Thereafter, you must do one of the following:

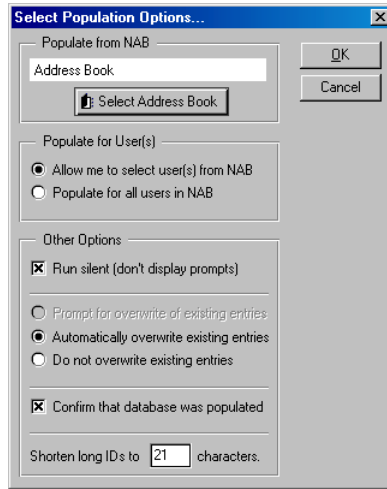
- Maintain users in RightFax and synchronize from RightFax to EFM Sync.
- Maintain users in the EFM Sync database and synchronize from EFM Sync to RightFax.

When users are imported from the Notes Address Book, RightFax mails the Connections document to those users.

1. In the **Fax Users** view, click the **Import Users from NAB** action button.

2. The **Select Population Options** dialog box opens.

Figure 2.5 Import Users from the Notes Address Book



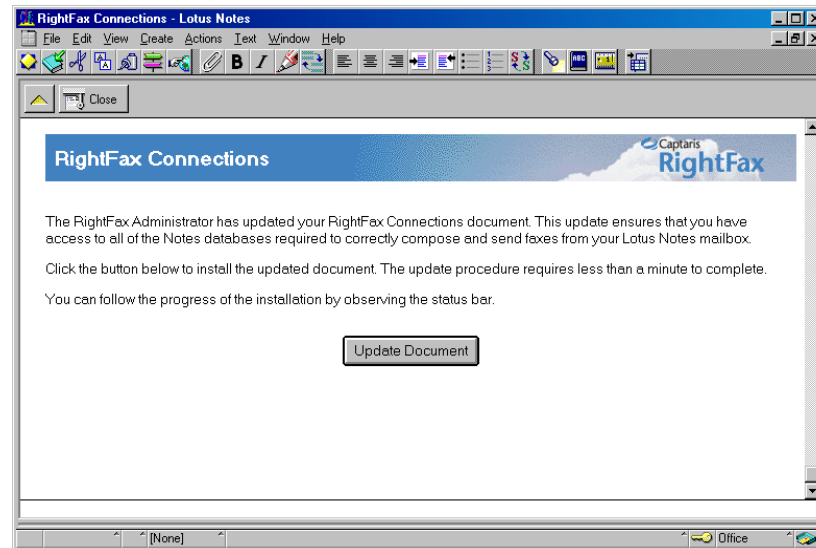
3. Select the address book to import from. From the selected address book, you have the option to select all users or pick the users you want to import.

To create RightFax user IDs that are 21 characters or fewer, in the **Shorten long IDs box** enter a value between 5 and 21.

4. Under **Other Options**, select **Run silent** if you want to import users without prompts. This option is helpful for importing a large number of users, because you can leave the system unattended during the import process.
5. Select one of the following options:
 - **Prompt for overwrite of existing entries.** If a duplicate entry is found, you will have the option to delete or retain the original entry.
 - **Automatically overwrite existing entries.** If a duplicate entry is found, the original entry will be deleted.
 - **Do not overwrite existing entries.** If a duplicate entry is found, the original entry will be retained.

- Click **OK** to import the users. When users are imported from the Notes Address Book, RightFax mails the Connections document to those users. Users receive the Connections document in their Inboxes. Depending on the settings in the Connections document (described on page 32), users must open the document, and click **Update Document**. This installs the fax factory database in their mail databases.

Figure 2.6 RightFax Connections Document

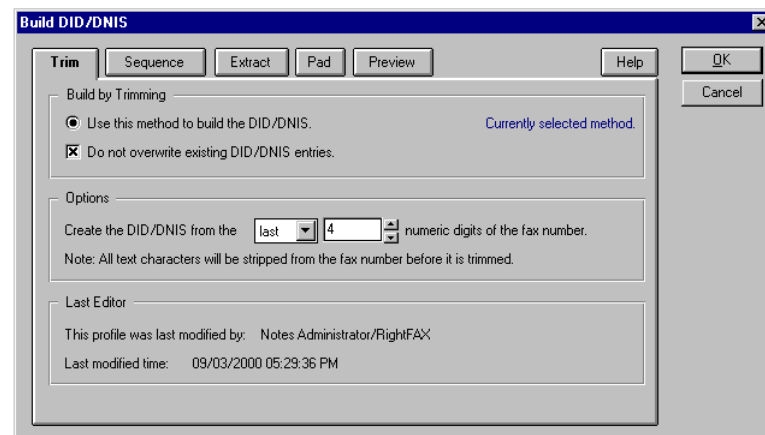


Creating routing codes

When you create new fax user documents in the EFM Sync database by importing from the Notes address book, the DID or DNIS routing code for each user is not copied. The codes must be created for the users.

- In the **Fax Users** view, click the **Create DID/DNIS for Selected Fax Users** action button. The **Build DID/DNIS** dialog box opens.

Figure 2.7 Build DID/DNIS Dialog Box



- To choose a method for building routing codes, refer to the **RightFax 8.5 Admin Help** database.

Creating RightFax administrators

Except for phonebook entries, changes to the EFM Sync database can be made only by RightFax administrators.

During the gateway installation (described in [Chapter 1, "Installing the Gateway for Lotus Notes"](#)), a RightFax administrative group is created in the Notes Public Address Book. Any Notes users in the RightFax administrative group can grant or deny access to other users. Add or remove Notes users to this group to grant or deny access to EFM Sync. Members of this group must have Notes Manager access rights to EFM Synchron.

To make changes to the EFM Sync database, members of this group must also be assigned administrative rights in RightFax. You can assign these rights in the RightFax administration utility, Enterprise Fax Manager, or in EFM Sync. If you are synchronizing RightFax to Notes, you should create administrators in Enterprise Fax Manager.

To create RightFax administrators in Notes

1. In Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view. Open the **Fax Users** view. A list of your RightFax users appears in the view.
2. Open the user who should be a RightFax administrator. Under **Security**, select **User has fax administrative rights**.

Refreshing users' Notes mail template

If you are installing the *full* Notes Mail integration with RightFax, you must distribute the RightFax mail template design to all Notes mail users. Users' mail databases will be refreshed with the RightFax mail template design.

To update the design

At the command prompt in the Domino server console window, type `Load Design` and press ENTER. Depending on the number of Notes mail users, the process may take several minutes. The process is complete when the prompt **Database Designer Shutdown** appears.

Configuring Users for E-mail Notification of Received Faxes

The gateway for Lotus Notes can be used for notification of received faxes whether or not the gateway is configured to actually send and receive faxes.

To configure a user to receive fax notifications in Notes

1. In RightFax Enterprise Fax Manager, double-click the user to open the **User Edit** dialog box, and then click the **Notification** tab.

Figure 2.8 The User Edit Notification Tab in RightFax

The screenshot shows the 'User Edit' dialog box with the 'Notification' tab selected. The 'Notification Method' is set to 'Lotus Notes'. The 'Notification Address/Info' field contains 'JANE DOE'. Under 'Notification about outbound faxes', the following checkboxes are checked: 'Error encountered, fax will be abandoned', 'Fax is successfully sent', 'Fax is incomplete', and 'Fax is held/ready for preview'. Under 'Notification about received faxes', the 'When initially received' checkbox is checked. The 'Reroute to user' field is empty.

2. In the **Notification Method** list, click **Lotus Notes**.
3. In the **Notification Address/Info** box, type the common name format of the first entry in the User Name list of the intended recipient.
4. In the lists of notifications for outbound and inbound faxes, select the notifications that users should receive.

Group notification

The notification method can be configured for a group of RightFax users by editing the group properties in Enterprise Fax Manager and setting the group **Notification Type** to **Lotus Notes**.

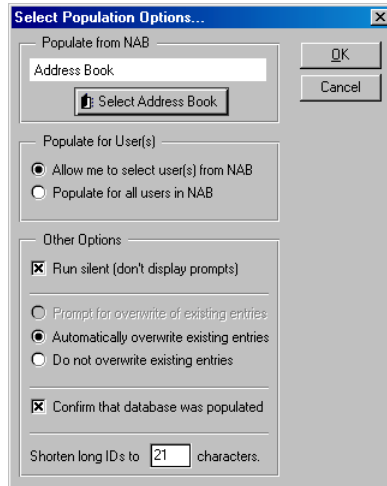
Importing Users to the RightFax Public Phonebook

You can import users to the RightFax public phonebook. Phonebooks are not synchronized.

To import users to the RightFax public phonebook

1. In Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view.
2. Open the **Phonebooks** view, and click **Populate Public Phonebook View**. The **Select Population Options** dialog box opens.

Figure 2.9 Import Users from the Notes Address Book



3. Select the address book to import from. From the selected address book, you have the option to select all users or pick the users you want to import.
4. Under **Other Options**, select **Run silent** if you want to import users without prompts. This option is helpful for importing a large number of users, because you can leave the system unattended during the import process.
5. Select one of the following options:
 - **Prompt for overwrite of existing entries.** If a duplicate entry is found, you will have the option to delete or retain the original entry.
 - **Automatically overwrite existing entries.** If a duplicate entry is found, the original entry will be deleted.
 - **Do not overwrite existing entries.** If a duplicate entry is found, the original entry will be retained.
6. Click **OK** to import the users to the RightFax public phonebook.

■ ■ ■

Chapter 3

Using Notes to Send and Receive Faxes

Sending a Notes mail message to a fax number is similar to sending mail, except that the message is specially addressed. RightFax embedded codes provide flexibility when sending mail messages as faxes.

You can compose faxes while disconnected from the Domino server (for example, using a laptop).

You have the option to preview a fax before sending it, and you can forward a fax that was sent to you.

This chapter includes instructions for working with phonebooks and the RightFax User Options document. The User Options document provides default settings for sending and receiving faxes.

Sending a Fax

Sending a Notes mail message to a fax number is similar to sending mail, except that the message is specially addressed.

Text entered in the **Subject** box in the Notes mail message will appear in the “Notes” section of the fax cover sheet. Text entered in the body of the mail message will appear as the body of the fax. Attached files will be converted to fax images and appended to the fax. Formats that RightFax converts are described in [Appendix B, “File Formats that Convert to Fax Format”](#). Unsupported file attachments cannot be converted and will be ignored.

You have the following options for sending a fax:

- Send a fax using the Notes mail message form.
- Send a fax using the RightFax advanced fax form. The advanced fax form contains RightFax functionality, which your RightFax administrator may have added to your Notes mail database.

RightFax embedded codes are special faxing instructions that you can add to mail messages that will be converted to faxes. You can use embedded codes to include fax cover sheet information, attach library documents, add billing information, and more. For information, see [“Using RightFax Embedded Codes in Mail Messages”](#) on page 47.

To send a fax using the Notes mail message form

Open a new mail message form in your mail database, and then address the fax using the following format:

Name@FaxNumber@FaxDomain

Name is the recipient name, FaxNumber is the fax number, and FaxDomain is the domain established on your system for sending faxes.

For example, to address a fax to John Smith at fax number 555-6732 and have the fax delivered to the RFAX foreign domain, type the following address:

```
John Smith@555-6732@RFAX
```

To send a fax using the advanced fax form

1. Open your mail database and display your Inbox.
2. Click **New Fax** in the Action bar, or on the **Actions** menu click **Fax Tools**, and then click **New RightFax Fax**. This opens a new mail message and displays the **Fax Information** dialog box (described on page 40).
3. Add one or more fax recipients and specify your cover sheet options, library document attachments, and other sending preferences. Click **OK**.

To send the mail message to e-mail addresses in addition to fax addresses, click **E-mail** in the Action bar. The Notes **Mail Address** dialog box opens, and you can select one or more e-mail addresses.

4. Complete the **Subject** line and type the body of the mail message. File attachments will be converted to fax format and added to the end of the fax in the order they are listed.
5. When the mail message is ready to send, click **Send**.

Using the Fax Information Dialog Box

When you create a new fax from your mail database by selecting **New RightFax Fax**, Notes opens the **Fax Information** dialog box. Use this dialog box to select one or more fax addresses from your address books or type the address information. You can also specify cover sheet options, add library document attachments, and customize several other sending preferences.

The Send To tab

Figure 3.1 The Send To Tab

Note When you select an address from the Notes personal address book, that address must have an Office Fax entry in order to send. Even if the Home Fax box is completed, if there is no Office Fax setting, the fax will not send.

Fax List. This group of options lets you select one or more fax addresses. You can send faxes to addresses selected from one of the following address books:

- RightFax personal phonebook
- RightFax public phonebook
- Notes personal address book
- Notes public address book or Domino folder

Select a phonebook in the **Source** list and a fax domain in the **Domain** list. (Up to five address books can be used.) Click the **Name Selection** button (with the person icon) next to the **To:** or **cc:** box. This lists all addresses (both group and individual) in the selected phonebook. Select the addresses you want and click **OK** to enter them in the specified box.

To delete all addresses in a list, click **Delete** (the red **X** button). To delete all addresses from both lists, click **Clear All**.

New Entry. If you are sending a fax message to a fax address that is not already listed in one of your phonebooks, you can type the fax addressing information in the boxes under **New Entry**.

Click **Add to Fax List Only** to use the address you enter with the current fax. Click **Add to Fax List and Phonebook** to use the address you enter with the current fax *and* add it to the phonebook specified in the **Source** list under **Fax List**.

Enter the name, company name, fax number(s), and voice number(s) of the addressee, and then click **To:** or **cc:** to add the address to the list of recipients.

The Cover Sheet tab

Figure 3.2 The Cover Sheet Tab

The screenshot shows the 'Fax Information' dialog box with the 'Cover Sheet' tab selected. The 'Cover Sheet' section includes a 'Use cover sheet?' dropdown set to 'Yes', a 'Resolution' dropdown set to 'Normal', and a 'Select a cover sheet...' dropdown set to 'FCS.PCL - Default Cover Page'. The 'From' section includes text boxes for 'From Name' (DJA), 'Company Name' (Captaris), 'Voice Number' (555-7629), 'Fax Number' (555-0144), and 'General Fax Num' (555-7000). The 'Cover Sheet Notes / Subject' section contains a text area with the placeholder text 'This text will appear in the Subject line of the Notes fax form...'. Buttons for 'Send To', 'Options', 'Attachments', 'OK', and 'Cancel' are also visible.

Cover Sheet. These options let you select and customize a cover sheet. Specify whether or not to include a cover sheet, the resolution for the cover sheet, and the cover sheet file to use. Some or all of the cover sheet options may be unavailable, depending on your RightFax user settings..

From. These boxes let you specify return address information on the fax cover sheet. If the fax is sent without a cover sheet, these settings will not be included in the fax.

Cover Sheet Notes/Subject. Enter a subject. This text will appear on the fax cover sheet.

The Options tab

Figure 3.3 The Options Tab

Use Smart-Resume. Tells the fax server to intelligently re-send only the portion of a fax that failed to send. For example, if the connection is broken after 40 pages of a 50-page fax, normally all 50 pages have to be re-sent. By enabling Smart-Resume, the fax server will re-send only the last ten pages.

Auto-Delete After Send. Specifies when to delete sent faxes from your RightFax mailbox.

Fax Priority. Sets the priority at which the faxes are responded to by the fax server. High priority will only be an option if you have been granted the high priority permission in RightFax.

Hold for Preview. Sends the fax to your mailbox first so that you can review it and then send it. This option lets you check the appearance of the fax before it is sent.

Notification. You can receive a notification if the fax is successfully or unsuccessfully sent. Select **On Failure** to receive a notice that the fax failed. Select **Always** to receive a notice of success or failure. Select **Never** if you don't want to receive a notice.

Deliver Only to CSID. You can specify that the fax only be delivered to a fax machine with a specific CSID (a special ID that is exchanged between sending and receiving fax machines.) This can help prevent sensitive faxes from being accidentally sent to the wrong fax number. Enter the exact CSID of the destination fax machine in this box. This entry is case-sensitive. If this box is blank, the fax will be transmitted to *any* receiving fax machine regardless of its CSID.

Retry Count. The number of times to retry sending the fax if a connection can't be made or is dropped.

Retry Interval. The number of minutes between retry attempts.

Overlay Form. Select an overlay form (if any) to add to the fax.

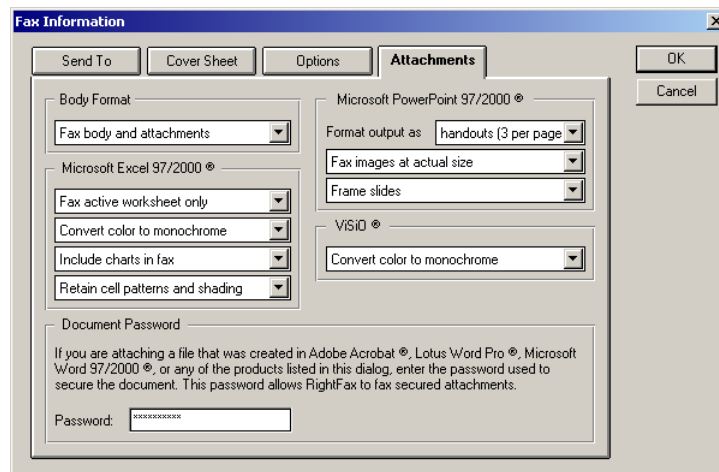
Library Documents. Select any library documents to include with the fax. Library documents are added to the end of the fax in the order they are added to this list.

Delay Send. If you do not want your fax to send immediately, these settings let you specify a future date and time to send the fax.

Billing Code. Specify up to two billing codes to associate with the fax.

The Attachments tab

Figure 3.4 The Attachments Tab



The options on this tab apply only to attachments to fax-bound Notes mail messages that are converted to fax format using server-side application conversion on the RightFax server (described in the *RightFax Administrator's Guide*).

Body Format. When you send a fax with attached documents, the following image files are generated:

- Cover page (if any).
- Fax body page that includes icons that represent the attachments (as shown in the Notes mail message when you prepare it).
- The attached documents.

Fax body and attachments sends the cover page, fax body page, and attachments.

Fax file attachments only sends the cover page and attached documents. This option does not send the fax body page containing the icons that represent the attachments.

The options under **Microsoft Excel**, **Microsoft PowerPoint**, and **Visio** allow you to optimize how these types of file attachments will be converted. The password you enter in the **Password** box will be used when RightFax attempts to open a password-protected file for server-side application conversion.

Previewing Faxes

You have the option to preview a fax before sending it. This option lets you check the appearance of the fax before it is sent. You also can view the status of your faxes on the RightFax server.

To preview the fax

1. Open your mail database and display your Inbox.
2. Open the **RightFax Real-Time Fax Status** view.

Figure 3.5 Previewing Faxes

Event Time	Status	Fax Server	From	Result
Held for Approval				
06/25/2001 01:09:38 PM	WAITING	RIGHTFAX	Notes Administrator/RightFax	Fax is waiting for approval
Held for Preview				
06/25/2001 12:09:38 PM	HELD	RIGHTFAX	Notes Administrator/RightFax	Fax is held for preview
In Process				
06/25/2001 01:09:38 AM	HELD	RIGHTFAX	Notes Administrator/RightFax	Fax needs attention
06/25/2001 12:09:38 PM	ERROR	RIGHTFAX	Notes Administrator/RightFax	Too many errors: Fax will not be retried
06/25/2001 12:09:38 PM	HELD	RIGHTFAX	Notes Administrator/RightFax	Fax requires FCS and none was specified
06/25/2001 12:09:38 PM	WAITING	RIGHTFAX	Notes Administrator/RightFax	Fax is waiting for conversion
06/25/2001 12:09:38 PM	IN CONVERSION	RIGHTFAX	Notes Administrator/RightFax	Fax is in conversion
06/25/2001 12:09:38 PM	SENDING	RIGHTFAX	Notes Administrator/RightFax	Fax is currently sending
06/25/2001 12:09:38 PM	SCHEDULED	RIGHTFAX	Notes Administrator/RightFax	Fax is scheduled for send
06/25/2001 12:09:38 PM	SENT	RIGHTFAX	Notes Administrator/RightFax	Network-forwarded fax
06/25/2001 12:09:38 PM	ERROR	RIGHTFAX	Notes Administrator/RightFax	Fax had an error. Fax will be retried
06/25/2001 12:09:38 PM	IN OCR	RIGHTFAX	Notes Administrator/RightFax	Fax is currently in OCR processing
06/25/2001 12:09:38 PM	QUEUED	RIGHTFAX	Notes Administrator/RightFax	Fax is queued for printing
06/25/2001 12:09:38 PM	UNKNOWN	RIGHTFAX	Notes Administrator/RightFax	Unknown. See Administrator
06/25/2001 02:09:38 PM	PRINTING	RIGHTFAX	Notes Administrator/RightFax	Fax is currently printing
06/25/2001 03:10:11 PM	WAITING	RIGHTFAX	Notes Administrator/RightFax	Fax is waiting to be sent
06/25/2001 03:47:19 PM	QUEUED	RIGHTFAX	Notes Administrator/RightFax	Fax is queued for OCR processing
06/25/2001 04:18:56 PM	HELD	RIGHTFAX	Notes Administrator/RightFax	Fax needs an attachment
06/25/2001 06:15:01 PM	WAITING	RIGHTFAX	Notes Administrator/RightFax	Fax is waiting for validation
Sent				
06/25/2001 12:09:38 PM	SENT	RIGHTFAX	Notes Administrator/RightFax	Fax was successfully sent

3. Faxes held for preview appear in the **Held for Preview** list. Double-click a fax to view it, and click **Release** to send it. When released, a message is sent to the mail router that the document can be released. Click **Cancel** to cancel the fax.

Forwarding Faxes

E-mail messages and faxes can be forwarded automatically from your mail database to another user's mail database. The feature complements the Notes out-of-office agent, which delivers an away message to the originator of a message. It is available only if your system is installed with the full Notes Mail integration with RightFax.

You can choose recipients, choose to forward e-mail messages and/or faxes, and choose whether or not to save forwarded messages.

To configure forwarding

1. Open your Notes mail database to any view.
2. From the **Actions** menu, select **Mail Tools**, and then select **Autoforward Settings**. The **Autoforward Settings** dialog box opens.
3. A message will appear warning you that the autoforward agent will not run if you do not have sufficient security access. To disable future displays of this warning, select the appropriate check box.
4. Configure the forwarding options by referring to the online help in the Notes database.

Receiving Notice that a Fax is Undeliverable

RightFax faxes and Notes mail messages sent to fax destinations will be returned to the sender if delivery is unsuccessful. The fax will be returned in the form of a report titled “Fax Delivery Failure.” From within the report, the fax can be re-addressed and sent again.

Working with Phonebooks

When addressing faxes, Notes users can send faxes to addresses selected from one of the following address books. Up to five address books can be used. These address books are never synchronized.

- RightFax personal phonebook
- RightFax public phonebook
- Notes personal address book
- Notes public address book or Domino folder

The two RightFax phonebooks are maintained as part of the EFM Sync database (see “Importing Users to the RightFax Public Phonebook” on page 38).

Notes users have the following options for adding entries to the RightFax phonebooks:

- Add new entries when addressing outgoing fax messages in the **Fax Information** dialog box (see “Using the Fax Information Dialog Box” on page 40).
- Add new entries directly to the RightFax phonebooks.
- Add new entries to the RightFax personal phonebook by copying from the Notes personal address book.

To add new entries to the RightFax phonebooks

1. From the Notes Workspace, double-click the **EFM Sync** icon.
2. Select **Phonebook Entry** from the **Create** menu. This opens the **New Phonebook Entry** dialog box.

Figure 3.6 The New Phonebook Entry Dialog Box

3. Under **Phonebook Entry Type**, specify an individual or group phonebook entry. When creating individual entries, you must specify the fax number and other addressing information for the new entry. When making a group entry, you only add existing individual phonebook entries to the group.
4. Under **Security**, specify whether you want the new entry to be private or public, and if you want the entry hidden from the cc: and bcc: lists.
5. Under **Entry Basics**, enter the name and address information.
6. Under **Phonebook/Owner ID**, in the **Phonebook ID** field, enter an identifier for the entry. In the **Owner ID** field, select the owner of the phonebook where the entry will be placed.
7. Save and close the document.

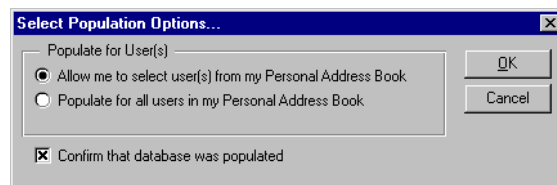
To copy entries from your Notes personal address book to your RightFax personal phonebook

You can create entries in your personal RightFax phonebook by copying them from your Notes personal address book. This procedure requires the NAMES.NSF database on your local hard drive in the Notes data folder. If it has been moved from that location, it should be restored before you proceed.

During this procedure, you have the option to select entries or copy all phonebook entries to your personal RightFax phonebook.

1. From the Notes Workspace, double-click the **EFM Sync** icon.
2. Open the **Phonebooks** view, and click **Add Entry from my Notes NAB**. The **Select Population Options** dialog box opens.

Figure 3.7 The Select Population Options Dialog Box



3. To copy all the Notes entries to the RightFax address book, select **Populate for all users in my personal address book**. To choose specific entries to copy, select **Allow me to select user(s) from my personal address book**.
4. To confirm the copy process, select the check box **Confirm that database was populated**. When the copy process is complete, a dialog box will open that lists the number of phonebook entries attempted, the number of successful attempts, and the number of failed attempts, if any.
5. Click **OK**. If you selected the option to choose specific entries, you will be prompted to select the names to copy.

Using RightFax Embedded Codes in Mail Messages

Embedded codes are special faxing instructions that you insert directly into fax-bound documents. You can use embedded codes to include fax cover sheet information, attach library documents, add billing information, and more.

To add an embedded code to a mail message, type the code you want, along with any required parameters, between angle brackets. For example, an embedded code that tells RightFax to send a library document called "PriceSheet" is written as:

```
<LIBDOC:PRICESHEET>
```

RightFax removes all embedded codes from the mail message during conversion so that they don't appear in your final fax. If you type an embedded code incorrectly, it will be ignored by RightFax and will be included in your fax. Embedded codes may be typed in upper case or lower case.

Embedded codes *must always* use a native printer font. This is because when the mail message converts to PCL5 format, all other font types are encoded as graphic images. Only native printer fonts are stored in the PCL file in their original text format. And it is this text in the PCL file that is replaced. If you do not use native printer fonts for your embedded codes, the codes themselves will appear in the instead of being replaced by the information or instruction they represent. All embedded codes are surrounded by angle brackets (< >) which must also use the same native printer font.

Note Windows 2000 may add unexpected spacing or other characters to embedded code strings even when using a native printer font. For embedded codes in e-mail messages created on Windows 2000 computers, RightFax recommends using the Courier native printer font only.

Embedded codes can be placed anywhere in the body of the mail message (they will *not* work in the Address or Subject fields). Embedded codes should not wrap to another line. An embedded code statement that wraps to a second line will be ignored.

For a description and example of each e-mail compatible embedded code see [Appendix A, "E-mail Compatible Embedded Codes"](#).

Composing and Sending a Fax When Working Offline

You can compose a fax when working offline, disconnected from the Domino mail server.

When you send a fax composed offline, it is delivered to your local MAIL.BOX database. It will be sent the next time you connect to the Domino mail server. Also, the Notes dial-up service will re-stamp the mail message with the date and time it is delivered to the Domino mail server. For example, if you compose a fax on Tuesday, and you connect to the Domino mail server on Friday, the fax will be stamped with Friday's date.

Also note that any errors in sending the mail message won't be detected until after you connect to the Domino mail server.

If you are sending a Notes mail message to a fax number, use the same procedure you use when working online (see ["Sending a Fax" on page 39](#)).

If you are sending a RightFax fax (by selecting **New RightFax Fax** in your Notes mail database), before you can compose a fax offline, you must create a local replica of the EFM Sync database. The database provides data to the fax form, such as sender name and sender fax number.

Understanding local replication and sending faxes

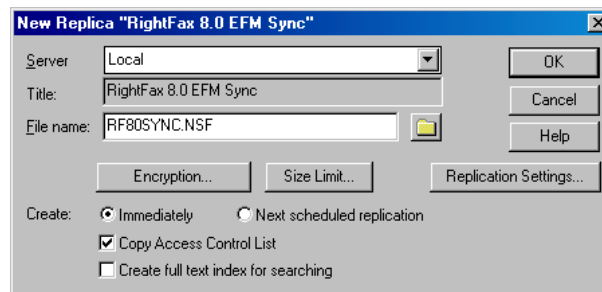
For delivery of the fax after you connect to the Domino server, the RightFax e-mail gateway refers to your fax user document in the EFM Sync database from which you created a replica. If the fax user documents are not in sync, the fax may be returned to you as undeliverable.

By default, the Notes client replicator updates all local replicas each time you connect to the Domino server. However, if local replication settings have been changed, be aware of the consequences for composing faxes offline. For example, if replication has been disabled for your local EFM Sync database, the local data will eventually be out of date.

To create a local replica of the EFM Sync database

1. In the Notes workspace, click to select the **EFM Sync** icon.
2. On the **File** menu, select **Replication**, and then **New Replica**. The **New Replica** dialog box opens. Complete the entries as shown in the following example.

Figure 3.8 The New Replica Dialog Box



3. Select **OK** to replicate the database.

Editing Your RightFax User Options in Notes

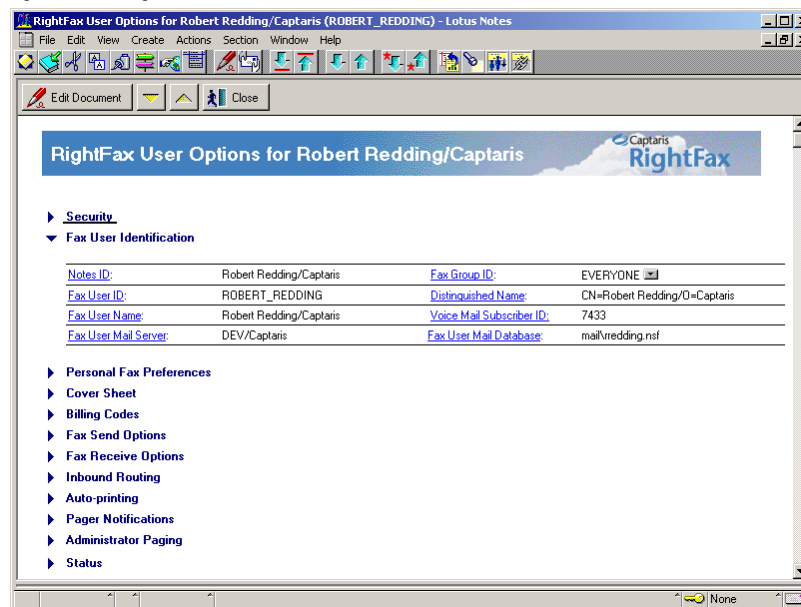
With some exceptions that are determined by your RightFax administrator, you can customize your user settings in your RightFax User Options document.

The EFM Sync database is a mirror of the RightFax database. If you are synchronizing RightFax to Notes, edit user options only in the RightFax administration utility, Enterprise Fax Manager, or the client application, FaxUtil.

To open the RightFax User Options document

1. Open your mail database and open the **RightFax Settings** view.
2. Open the **RightFax User Options** document.

Figure 3.9 The RightFax User Options in Notes



3. Because EFM Sync is a mirror of the RightFax database, each of these documents includes the same settings that appear in Enterprise Fax Manager. For a description of the settings for these objects, please refer to the appropriate chapter of the *RightFax Administrator's Guide*.
4. Save and close the document. All changes will be immediately made in the EFM Sync database.

■ ■ ■

Chapter 4

RightFax Logs and Reports in Lotus Notes

Lotus Notes generates RightFax event logs and RightFax status reports and stores them in the EFM Sync database.

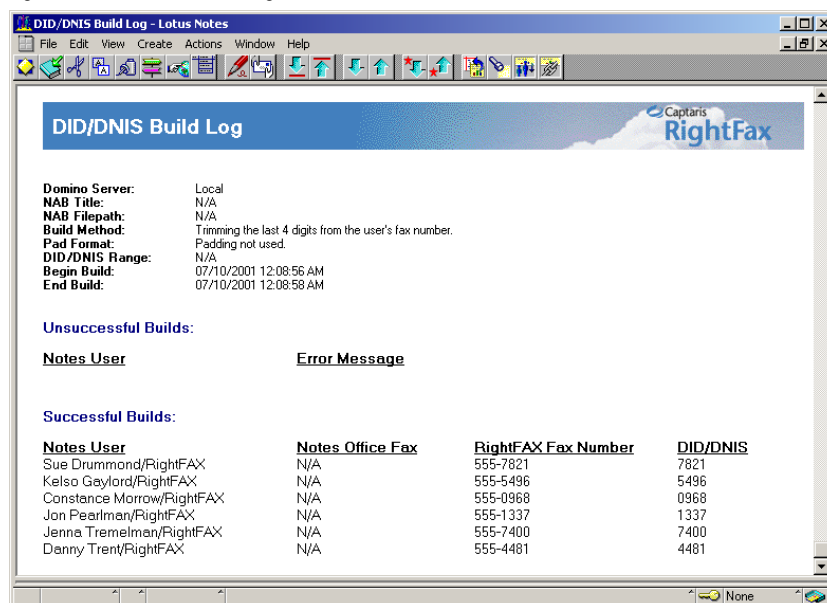
RightFax Event Logs

To open RightFax event logs in Notes, open the EFM Sync database, and then open the **Logs** view. Click each log document to view the log entries.

DID/DNIS Build Log

The DID/DNIS Build Log displays the results of the process used to assign DID or DNIS numbers to users. It records the build number, build starting time, build ending time, the method used to create the DID/DNIS entries, and the range of numbers that were created (for the sequential numbering method).

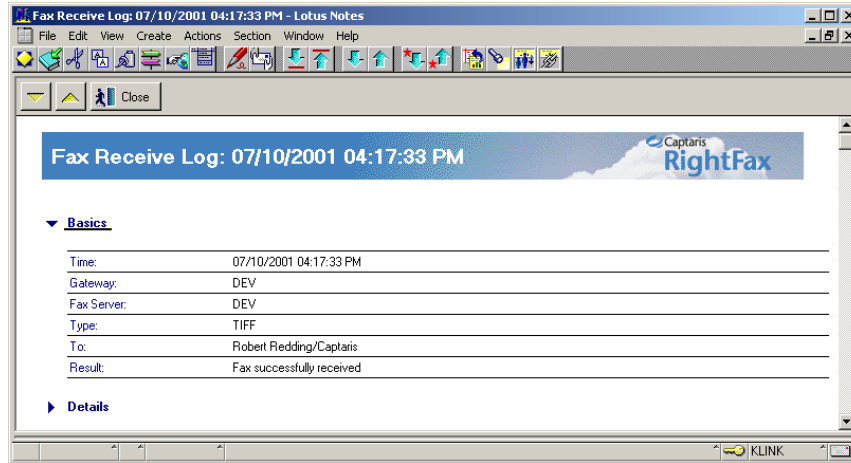
Figure 4.1 The DID/DNIS Build Log



Fax Receive Log

The Fax Receive Log displays a list of all faxes routed via the RightFax gateway to Notes. It records the time each fax was received, the name and description of the gateway that delivered the fax, and the transmission result.

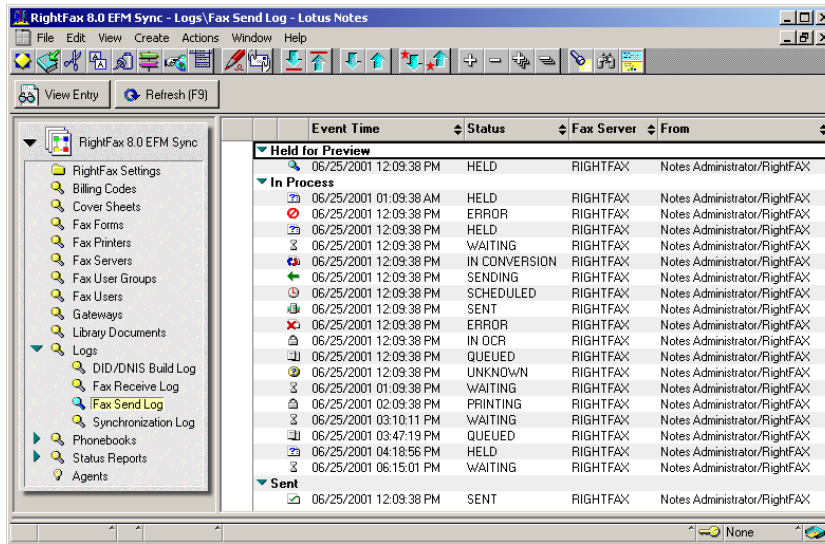
Figure 4.2 The Fax Receive Log



Fax Send Log

The Fax Send Log displays a list of all faxes sent to the RightFax server via the gateway. It records the time each fax was sent, the name and description of the gateway that sent the fax, and the transmission result.

Figure 4.3 The Fax Send Log

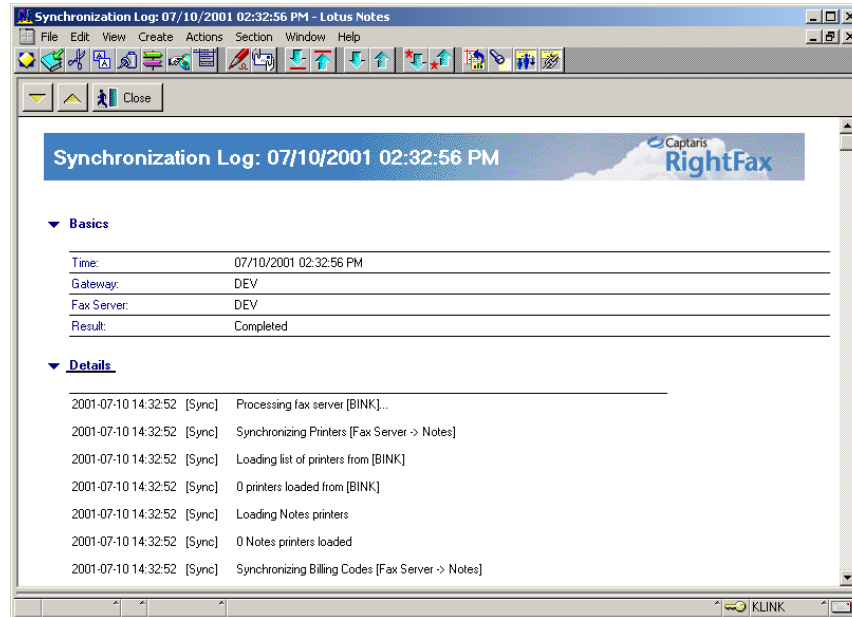


Synchronization Log

The Synchronization Log displays the synchronization events between the RightFax and Domino servers. It displays the time each synchronization event was recorded and the names of the gateway and RightFax server that were synchronized.

Double-click each synchronization log document to display details about the synchronization event. The level of detail in this log depends on the value you specify in the **Synchronization Logging** field in the Fax Server document in the EFM Sync database (see ["Enabling database synchronization"](#) on page 23).

Figure 4.4 The RightFax Synchronization Log



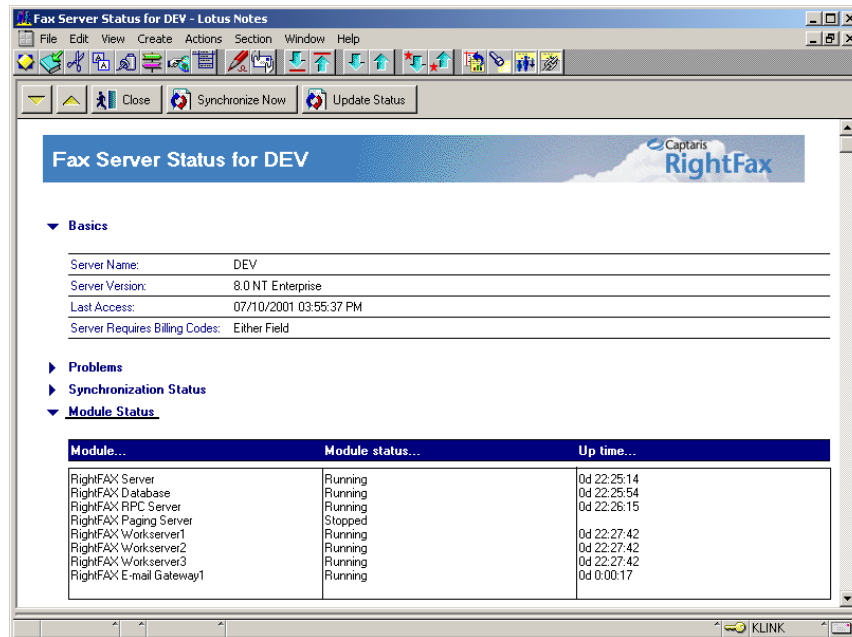
RightFax Status Reports

To open RightFax status reports in Notes, open the EFM Sync database and open the **Status Reports** view. The list of RightFax status reports appears.

Fax Server Status Report

When you select the Fax Server Status Report, a list of your RightFax servers appears. Double-click a server to open the Fax Server Status Report for that server. The status settings on the report cannot be edited. To change the status of synchronization events, edit the Fax Server document in the EFM Sync database (see ["Enabling database synchronization"](#) on page 23).

Figure 4.5 The Fax Server Status Report



Gateway Status Report

When you select the Gateway Status Report, a list of your RightFax e-mail gateways appears. Double-click an e-mail gateway to open the Gateway Status Report for that server. The status settings on this report cannot be edited. To change the status of any listed event, edit the Gateway document in the EFM Sync database.

Figure 4.6 The Fax Gateway Status Report

The screenshot shows a Lotus Notes window titled "Gateway Status for DEV (to Fax Server DEV) - Lotus Notes". The window contains a report with the following sections:

- Basics:**
 - Gateway Name: DEV
 - Connected Fax Server: DEV
 - Current Status: Running
 - Last Access: 07/10/2001 03:55:37 PM
- Problems:** (Collapsed)
- Gateway Event Status:**

Gateway event...	Event status...	Time last processed...
Synchronization:	Enabled	07/10/2001 02:32:56 PM
ICD Status:	Enabled	07/10/2001 03:55:37 PM
Fax Server Status:	Enabled	07/10/2001 03:55:37 PM
Inbound Faxing:	Enabled	07/10/2001 03:55:21 PM
Outbound Faxing - Body Contents Only:	Enabled	07/10/2001 03:55:22 PM
Outbound Faxing - Include Notes Form:	Disabled	

■ ■ ■

Appendix A

E-mail Compatible Embedded Codes

EEmbedded codes are special faxing instructions that you insert directly into fax-bound e-mail messages. You can use embedded codes to include fax cover sheet information, attach library documents, specify a time to send the fax, and more.

To add an embedded code to an e-mail message, type the code you want, along with any required parameters, between angle brackets. For example, an embedded code that tells RightFax to include the library document "Priceguide" along with the text of the e-mail is written as:

```
<LIBDOC2:PRICEGUIDE>
```

RightFax removes all embedded codes from the e-mail message when it converts it to fax form, so they don't appear in your final fax. If you type an embedded code incorrectly, it will be ignored by RightFax and will be included in your fax. Embedded codes may be written in either upper or lower case and embedded codes always work the same way regardless of the e-mail application used to create the document.

Although you can use any fonts you want in the text of your e-mail messages, embedded codes *must always* use a native printer font. This is because when the file is converted to PCL5 format, all other font types are encoded as graphic images. Only native printer fonts are stored in the PCL file in their original text format. It is this text in the PCL file that is replaced. If you do not use native printer fonts for your embedded codes, the codes themselves will appear in the instead of being replaced by the information or instruction they represent. All embedded codes are surrounded by angle brackets (< >) which must also use the same native printer font.

Note *Windows 2000 may add unexpected spacing or other characters to embedded code strings even when using a native printer font. For embedded codes in documents on Windows 2000 machines, RightFax recommends using the "Courier" native printer font only.*

Embedded codes can be placed anywhere in the e-mail message that you will be faxing. They cannot line wrap and any embedded code statement that is so long that it wraps to a second line will be ignored.

This appendix lists only embedded codes that are recognized by the e-mail gateways. RightFax supports several additional embedded codes when faxes are generated from native applications. For a complete list of embedded codes supported by RightFax, refer to the *RightFax Administrator's Guide*.

ATDATE (AT_DATE)**Format** <ATDATE:date>

Schedules the fax to send on a specific date. Dates can be expressed as relative or absolute. Relative dates give the number of days from today's date. For example, "+7" represents one week from today. Absolute dates specify the exact date to send the fax. Absolute dates must be written in one of these formats: MM/DD/YY, MM-DD-YY, or MM-DD-YYYY.

If no send time is specified with the ATTIME code (described later), the send time defaults to "now" (the current time of processing). For example, if a fax is sent to the queue at 3:30 p.m. and it contains only an <ATDATE:+1> code, it will automatically be scheduled to send at 3:30 p.m. tomorrow.

Maximum field length: 10 characters

Example <ATDATE:9-15-99>
<AT_DATE:+2>

ATTIME (AT_TIME)**Format** <ATTIME:time>

Schedules the fax to send at a specific time. The time can be relative or absolute.

Relative time is the number of hours or minutes from the current time. For example, "+2" is two hours from now. You can enter fractions of an hour in six-minute increments. Valid fractions of an hour are 0.1 through 0.9. You must enter at least one digit before and after the decimal point. For example, 1.5 and 0.3 are valid, and 1.50 and .3 are not valid.

Absolute times are entered in either 12-hour or 24-hour format. A colon separating hours and minutes is optional, and an "a" or "p" can be used to indicate A.M. or P.M. The fax server does not send the fax at exactly the minute specified. Rather, the fax becomes eligible for scheduling within 15 minutes of the specified time.

Specifying a time between the current time and midnight will schedule the fax to send today. Specifying a time earlier than the current time will schedule the fax tomorrow.

Maximum field length: 9 characters

Example <RFSAP_ATTIME:10:00p>
<RFSAP_AT_TIME:+2>

BILLINFO1 (BI1)**Format** <BILLINFO1:code>

Assigns a billing code to the fax. The billing code will be sent but it will not be validated by RightFax.

Maximum field length: 15 characters

Example <BILLINFO1:4444>

BILLINFO2 (BI2)**Format** <BILLINFO2:code>

Assigns a second billing code to the fax. The billing code will be sent but it will not be validated by RightFax.

Maximum field length: 15 characters

Example <BILLINFO2:5555>

CHANNEL

Format <CHANNEL:channel#>

Sends the fax only on the specified channel of the fax board. Specify a number corresponding to the channel to use. Set the channel number to 0 (zero) to use any available channel.

This code is useful if your organization uses one channel for priority faxing, and you want the fax to go out right away. You can also use this code to limit fax broadcasts to one channel only, leaving the other channels free for priority faxing.

Maximum field length: N/A

Example <CHANNEL:3>

COVER

Format <COVER>

Automatically generates a RightFax cover sheet for the fax containing the code. If the user sending the fax containing this code is configured to automatically generate a cover sheet, only one cover sheet will be generated.

Unless a cover sheet file name is specified using the <FCSFILE> embedded code (see "FCSFILE" on page 59), this code will automatically use the default cover sheet file.

Maximum field length: N/A

DELETE (AUODELETE)

Format <DELETE>

Deletes the fax from the user's FaxUtil mailbox after it has been successfully sent. This code overrides the default RightFax auto-delete setting.

Maximum field length: N/A

DELETEALL (AUODELETEALL)

Format <RFSAP_DELETEALL>

Deletes the fax from the user's FaxUtil mailbox after it has been sent, whether or not the send was successful. This code overrides the default RightFax auto-delete setting.

Maximum field length: N/A

FCSFILE

Format <FCSFILE:file name>

Uses the specified file as the RightFax-generated cover sheet. The cover sheet file must exist in the RightFax\FCS folder on the RightFax server and must end with the extension .pcl. Do not specify a directory path.

Maximum field length: 12 characters

Example <FCSFILE:MYCOVER1.PCL>

FINE

Format <FINE>

Converts the body of the fax using “fine” resolution (200 × 200 DPI). Fine resolution is recommended for faxes with detailed graphics and faxes that will be OCRed. This code overrides the default fax resolution set in the user's FaxUtil mailbox.

Maximum field length: N/A

FROMFAXNUM (FROM_FAXNUM)

Format <FROMFAXNUM:faxnumber>

Specifies the sender's fax number on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code will be ignored.

Maximum field length: 31 characters

Example <FROMFAXNUM: (520) 555-1234>

FROMGENFAXNUM (FROM_GENFAXNUM)

Format <FROMGENFAXNUM:faxnumber>

Specifies the company's general fax number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code will be ignored.

Maximum field length: 31 characters

Example <FROMGENFAXNUM: (520) 555-2345>

FROMGENPHONE (FROM_GENPHONE)

Format <FROMGENPHONE:phonenumber>

Specifies the company's general phone number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code will be ignored.

Maximum field length: 31 characters

Example <FROMGENPHONE: (520) 555-3456>

FROMPHONE (FROM_PHONE)

Format <FROMPHONE:phonenumber>

Specifies the sender's phone number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code will be ignored.

Maximum field length: 31 characters

Example <FROMPHONE: (520) 555-4567>

IGNORE

Format <IGNORE>

Causes all subsequent embedded codes to be ignored.

Maximum field length: N/A

LIBDOC

Format <LIBDOC:documentID>

Sends the specified RightFax library document *instead* of sending the document containing the code. Multiple library documents may be specified, each as a separate LIBDOC code.

Maximum field length: 21 characters

Example <LIBDOC:INFOPACK1>

LIBDOC2

Format <LIBDOC2:documentID>

Sends the specified RightFax library document *in addition* to sending the document containing the code. Multiple library documents may be specified, each as a separate LIBDOC2 code.

Maximum field length: 21 characters

Example <LIBDOC2:INFOPACK1>

NOCOVER

Format <NOCOVER>

Turns off automatic RightFax cover sheet generation for the document containing this code.

Maximum field length: N/A

NORMAL

Format <NORMAL>

Converts the body of the fax using “normal” resolution (100 × 100 DPI). Normal resolution faxes can be transmitted much faster than fine resolution faxes, saving time and phone charges. This code overrides the default fax resolution set in the user’s FaxUtil mailbox.

Maximum field length: N/A

PREVIEW

Format <PREVIEW>

Holds the fax for preview in your FaxUtil mailbox. You must view the fax in FaxUtil and select **Release** from the **File** menu before it will send.

Maximum field length: N/A

PRIORITY

Format <PRIORITY:priority>

Sets the priority of the outgoing fax. Allowed settings are: Low (L), Normal (N), and High (H). If a user specifies high priority and does not have the “Can use high priority” permission, the fax will automatically be sent with “normal” priority.

Maximum field length: N/A

Examples <PRIORITY:HIGH>
<PRIORITY:N>

SAVE

Format <SAVE>

Instructs RightFax to *not* delete the fax image from the user's FaxUtil mailbox after being sent. This overrides any default auto-delete setting.

Maximum field length: N/A

UNIQUEID

Format <UNIQUEID:faxID>

Specifies a unique ID for the fax instead of having one automatically generated by RightFax. Custom IDs may be used for external document tracking systems.

Maximum field length: 15 characters

Example <UNIQUEID:XYZ120396>

■ ■ ■

Appendix B

File Formats that Convert to Fax Format

The following table lists the software applications and document file formats that can be converted to faxes by the built-in conversion engine on the RightFax server. Only these file types can be converted from their native format by using the Send To function in Windows or by sending as file attachments to a fax message.

Table BA Document File Formats

Application or file format	Supported versions
Access	Versions through 2.0
AMI/AMI Professional	Versions through 3.1
ANSI text	All versions
ASCII text	All versions
Binary group 3 fax	All versions
BMP (including RLE, ICO, CUR & OS/2 DIB)	Windows
CDR (if TIFF image is embedded in it)	Corel Draw versions 2.0 through 9.0
dBASE	Versions through 5.0
DCX (multi-page PCX)	Microsoft Fax
DRW (Micrografx Designer)	Version 3.1
EPS (if TIFF image is embedded in it)	Encapsulated PostScript
Freelance for Windows	Version 1.0, 2.0, 96, 97, and Millennium
GIF	CompuServe
HTML	Versions through 3.0
JPEG	All versions
Lotus 1-2-3 (DOS & Windows)	Versions through 5.0
Lotus 1-2-3 (Windows)	Versions through 97
Lotus 1-2-3 Charts (DOS & Windows)	Versions through 5.0
MAC	MacPaint
Microsoft Excel (Macintosh)	Versions 3.0 through 4.0, 98
Microsoft Excel (Windows)	Versions 2.2 through 2000
Microsoft Excel Charts	Versions 2.x through 7.0
Microsoft PowerPoint (Macintosh)	Version 4.0, 98
Microsoft PowerPoint (Windows)	Versions through 2000
Microsoft Windows Works	Versions through 4.0

Table BA Document File Formats (continued)

Application or file format	Supported versions
Microsoft Works (DOS)	Versions through 2.0
Microsoft Write	Versions through 3.0
Microsoft Word (DOS)	Versions through 6.0
Microsoft Word (Macintosh)	Versions 4.0 through 98
Microsoft Word for Windows	Versions through 2000
Microsoft WordPad	All versions
Microsoft Works (Macintosh)	Versions through 2.0
Paradox (Windows)	Versions through 1.0
PCX bitmap	PC Paintbrush
PICT1 & PICT2 (Raster)	Macintosh Standard
QuattroPro for Windows	Versions through 9.0
Microsoft Rich Text Format (RTF)	All versions
TIFF	Versions through 6.0
TIFF CCITT Group 3 & 4	Fax Systems
Unicode Text	All versions
WMF	Windows Metafile
WordPerfect (DOS)	Versions through 6.1
WordPerfect (Macintosh)	Versions 1.02 through 3.0
WordPerfect for Windows	Versions through 9.0
WordPerfect Graphics (WPG and WPG2)	Versions through 2.0

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