



## 8.5 SecureDocs Module Guide

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# Introduction

The RightFax SecureDocs Module is used to send documents:

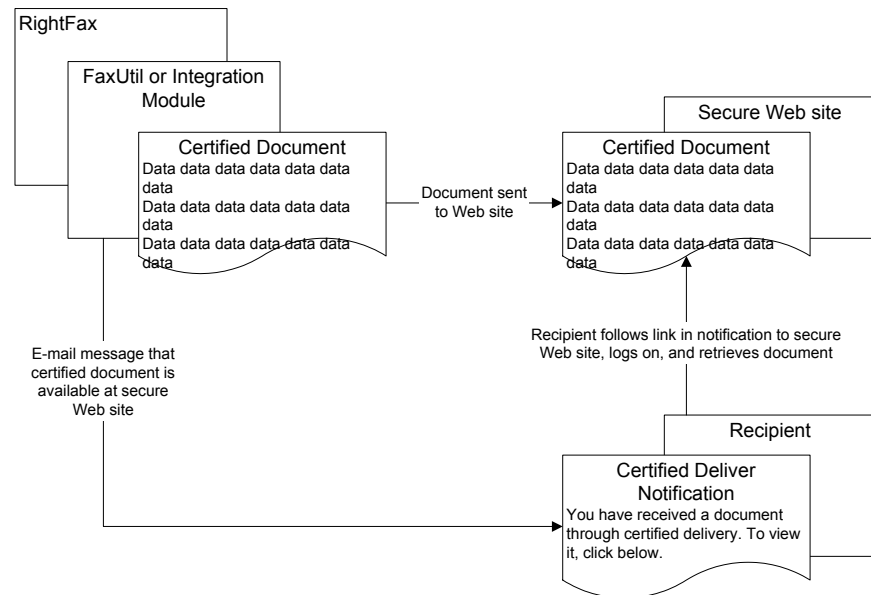
- For certified delivery.
- For certified delivery as encrypted Adobe® Acrobat® portable document format (PDF) files.
- To e-mail addresses as encrypted PDF files.

The SecureDocs Module can be used with RightFax desktop applications (such as FaxUtil or the RightFax Web Client) or with the RightFax Integration Module.

## Sending Documents via Certified Delivery

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

**Figure 0.1 Certified Delivery Document Flow**



A recipient who receives a document via certified delivery for the first time must create a password upon accessing the SecureDocs Web site. At each subsequent visit, the user must supply the password. The recipient can change the password, and he or she can request to receive the password in e-mail if it is forgotten.

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

## **Sending Encrypted Documents**

When an encrypted PDF document is sent, the document is password-protected. The recipient must provide the password in order to open and view the document.

Encrypted PDF documents can be sent via certified delivery, or they can be attached to an e-mail message.

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# Chapter 1

# Installing the SecureDocs Module

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

It also provides instructions for:

- ▶ Changing Web site information on the RightFax server after the SecureDocs Module is installed. See ["Using Enterprise Fax Manager to Change Configurations"](#) on page 12.
- ▶ Customizing the SecureDocs certified delivery Web pages for your organization. See ["Modifying the SecureDocs Web Pages"](#) on page 17.
- ▶ Synchronizing the database of recipient accounts that is maintained on the RightFax server. See ["Synchronizing the SecureDocs Database"](#) on page 18.

## Minimum System Requirements

- ▶ RightFax server version 8.5.
- ▶ For the SecureDocs certified delivery Web site, Microsoft Internet Information Server (IIS) version 4.0 or later.
- ▶ For sending documents via the Internet using the Integration Module, the InternetLink Module must be licensed.

## Upgrading from RightFax 8.0

The installed file structures have changed since RightFax 8.0. If you have installed and customized the pages of the SecureDocs certified delivery Web site, you should save the pages in a separate folder before installing SecureDocs version 8.5. If you do not save the pages, they will be replaced.

The RightFax 8.5 file path is c:\Program Files\RightFax\WebApps\SecureDocs.

The RightFax 8.5 virtual directory is http:\server\SecureDocs.

## Understanding the Installation Process

Installing the SecureDocs Module requires the following basic steps:

1. Install the RightFax server. For instructions, see the *RightFax Administrator's Guide*.
2. Install a PostScript print driver on the server, as described in the *RightFax Administrator's Guide*. If PDF documents with color will be created, select a print driver that supports color, such as the Apple LaserWriter II NTX.

3. Install the SecureDocs Module on the RightFax server. To begin, see “[Installing the SecureDocs Module](#)” on page 8.
4. Install the certified delivery Web site on the IIS server. This is the Web site where sent documents are viewed by recipients. To begin, see “[Installing the Certified Delivery Web Site](#)” on page 10.

## Installing the SecureDocs Module

### Activating the Web Client Software on the RightFax Server

The SecureDocs software is provided with all RightFax servers during the server installation. However, the RightFax SecureDocs Module must be licensed and activated before it can be installed.

The SecureDocs software is automatically activated on all RightFax Enterprise Integration servers.

To activate the SecureDocs Module 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*.

### Before You Begin

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

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

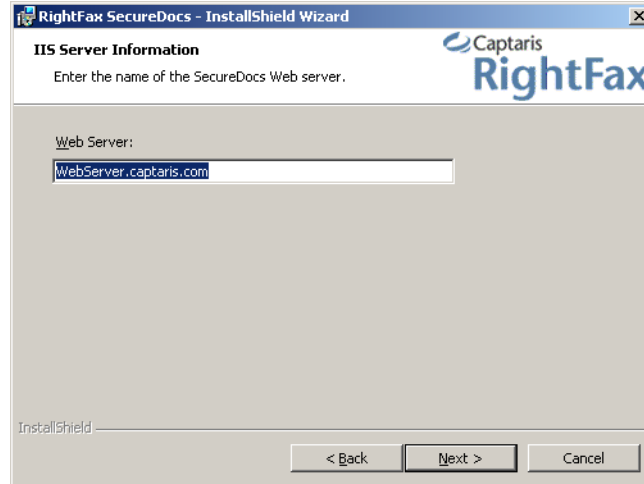
At the end of the installation, the computer will need to be re-started to complete the installation. When you re-start and log on again, the SecureDocs installation will continue. If you cancel, the installation will not finish. You will be required to begin the installation from the beginning to complete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

### Installing the Module

1. On the RightFax server computer, navigate to RightFax\Production\SecureDocs Install and run Setup.exe.
2. When prompted to accept the terms of the license agreement, click to accept.
3. When prompted, enter your user name and organization.

4. In the **IIS Server Information** window, in the **Web Server** box, the RightFax server computer name appears. If you will be installing the certified delivery Web site on a different server, enter the fully qualified domain name of the IIS server.

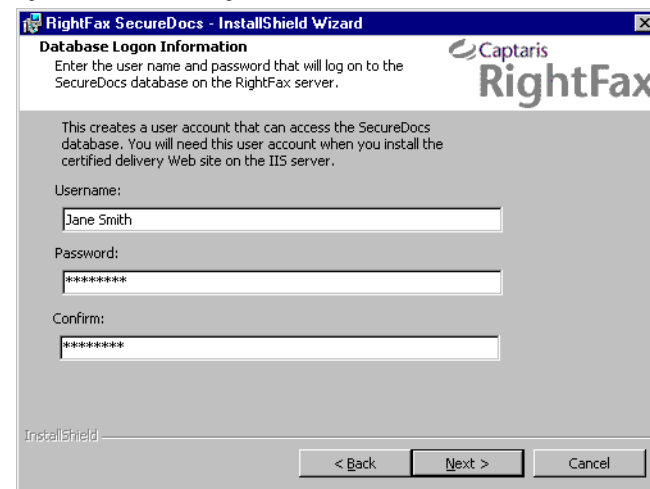
Figure 1.1 The IIS Server Information Window



5. In the **Database Logon Information** window, enter the user name and password for the account that can log on to the certified delivery database. Write down this information, because you will need to enter this user name and password during the installation of the certified delivery Web site (see ["Installing the Certified Delivery Web Site"](#) on page 10).

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

Figure 1.2 The Database Logon Information Window



6. During the installation, you will be prompted to re-start the computer. When the computer re-starts, you must log on, and the installation will continue. If you cancel, the installation will not be completed.

## Installing the Certified Delivery Web Site

### Before You Begin

During the installation, you can specify SMTP mail hosts for the following services. Be prepared to enter the name of the mail host.

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

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

### Installing the Web Site

1. Navigate to the RightFax\Production\SecureDocs Install\IIS folder. Double-click to run Setup.exe.
2. When prompted to accept the terms of the license agreement, click to accept.
3. When prompted, enter your user name and organization.
4. In the **Required Web Site Information** window, complete the following boxes:
  - In the **Root Web Site Name** box, enter the name of the root Web site on the IIS server where the certified delivery Web site will be installed.
  - In the **Virtual Directory Name** box, enter the name of the certified delivery Web site that you entered when installing the SecureDocs Module (see "Installing the Module" on page 8.)
  - In the **RightFax Server Name** box, if you are installing the SecureDocs certified delivery Web site on this RightFax server, enter a period (.). If you are installing the Web site on a computer other than the RightFax server, enter the fully qualified domain name of the remote RightFax server.

Figure 1.3 The Required Web Site Information Window

The screenshot shows a window titled "RightFax Certified Delivery - InstallShield Wizard" with the subtitle "Required Web Site Information". The Captaris RightFax logo is in the top right. There are three text input fields:
 

- Root Web Site Name: Default
- SMTP Host Name: SecureDocs
- RightFax Server Name (, = local): Fax1.captaris.com

 At the bottom, there are three buttons: "< Back", "Next >", and "Cancel". The InstallShield logo is in the bottom left corner.

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

In the **Optional Web Site Information** window, you can specify information to be sent with these e-mail messages. (You can also enter this information later. To do so, see ["Configuring the Certified Delivery Web Site"](#) on page 13.)

**Figure 1.4 The Optional Web Site Information Window**

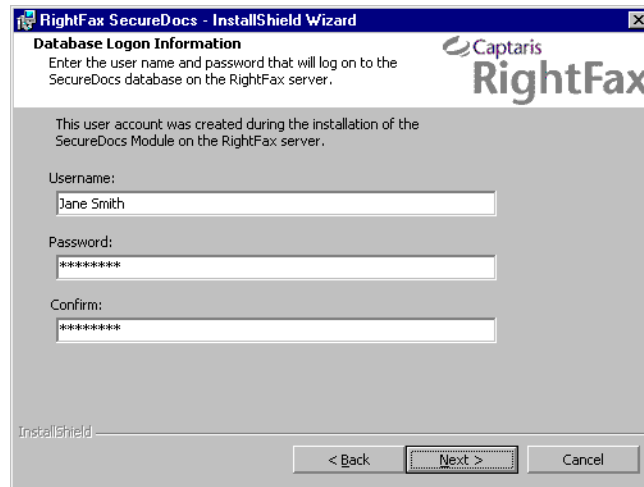
The screenshot shows a window titled "RightFax Certified Delivery - InstallShield Wizard" with a sub-header "Optional Web Site Information". Below the sub-header is a brief instruction: "Optionally, you can enter a text file name to use as the message body, your email from address, email display name, and the subject you want to use." The main area contains four text input fields: "Body Text File:", "Email From Address:", "Email Name:", and "Email Subject:". The "Email Subject:" field is pre-filled with "Requested Certified Delivery Password". At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

Complete the following boxes:

- In the **Body Text File** box, enter the file name and path to a text file that contains the text of the e-mail messages that are sent with passwords to recipients who request them. The default message is "Requested Certified Delivery Password: *password*." To create a text file, see ["Creating the Message to Send with Passwords"](#) on page 16.
  - In the **Email From Address** box, enter the e-mail address from which the messages will be sent. The default address is *computer name@domain name*.
  - In the **Email Name** box, enter the name that should appear as the sender of the e-mail message. The default is "Certified Document Delivery."
  - In the **Email Subject** box, enter the text that will appear in the subject line of the e-mail message. The default is "Certified Document Delivery."
6. In the **Database Logon Information** window, enter the user name and password for the account that can log on to the certified delivery database. Enter the same user name and password that were entered during the installation of the SecureDocs Module on the RightFax server (as described in ["Installing the SecureDocs Module"](#) on page 8).

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

Figure 1.5 The Database Logon Information Window



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

### Installing the Web Site on a Secure Server

If you are installing the certified delivery Web site on a secure server with secure sockets layer (SSL), make the following Windows registry entries:

- On the IIS server edit the subkey  
HKEY\_LOCAL\_MACHINE\Software\RightFax\Production\CertDoc. Create the REG\_DWORD value name `SSLEnabled` and set the value to 1.
- On the RightFax server, edit the subkey  
HKEY\_LOCAL\_MACHINE\Software\RightFax\Production\INL. Create the REG\_SZ value name `LinkProtocol` with the data `https:`.

## Using Enterprise Fax Manager to Change Configurations

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

1. On the RightFax server, on the **Start** menu, select **Programs > RightFax > Enterprise Fax Manager**. The **Enterprise Fax Manager** window opens.
2. In the **Fax Servers** list, select the server where the SecureDocs Module is installed.
3. In the **Service Name** list, double-click **RightFax Server Module**. The **Server Configuration** window opens.

4. On the **eTransport** tab, in the **SMTP Hostname** box, enter the name of the mail host that will send messages to notify recipients that a document can be viewed at the certified delivery Web site. This message is sent from the SecureDocs Module on the RightFax server.

**Figure 1.6 The eTransport tab**

5. In the **Web Server** box, the domain name of the IIS server where the certified delivery Web site is installed appears.
6. In the **Web Site** box, the name of the certified delivery Web site appears.

## Configuring the Certified Delivery Web Site

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

- Specify information to be sent with e-mail messages that are sent to recipients of certified delivery documents. See ["Specifying the SMTP Mail Host, Sender E-mail Address, and Sender Name"](#) on page 13.
- Recipients of documents via SecureDocs certified delivery must obtain passwords before they can view documents on the certified delivery Web site. If a user forgets the password, the SecureDocs Module sends the password in an e-mail message on request. See ["Including Messages with Passwords"](#) on page 14.
- Support for Netscape 6. See ["Supporting Netscape 6"](#) on page 16.

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

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

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

**To specify the information that is sent with passwords**

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

**Figure 1.7 The SMTP Mail Tab**

**SecureDocs Configuration**

SMTP Mail | SMTP Message | Netscape 6

This page contains values specific to the delivery of SMTP EMail used in the SecureDocs process.

**SMTP Host**  
Enter the name of the SMTP host or gateway used to deliver your Internet EMail messages.  
server.domain.com

**E Mail Addresses**  
Enter the Address you would like to use as the from address on any outgoing E Mails (example: SecureDocs@company.com)  
  
Enter the Name you would like to use as the from name on any outgoing E Mails (example: SecureDocs)

OK Cancel Apply

3. In the **SMTP Host** box, enter the name of the SMTP mail host that will send passwords from the SecureDocs certified delivery Web site.
4. In the first **E Mail Addresses** box, enter the e-mail address from which the messages will be sent. The default address is *computer name@domain name*.
5. In the second **E Mail Addresses** box, enter the name that should appear as the sender of the e-mail message. The default is "Certified Document Delivery."
6. Click **Apply**.

**Including Messages with Passwords**

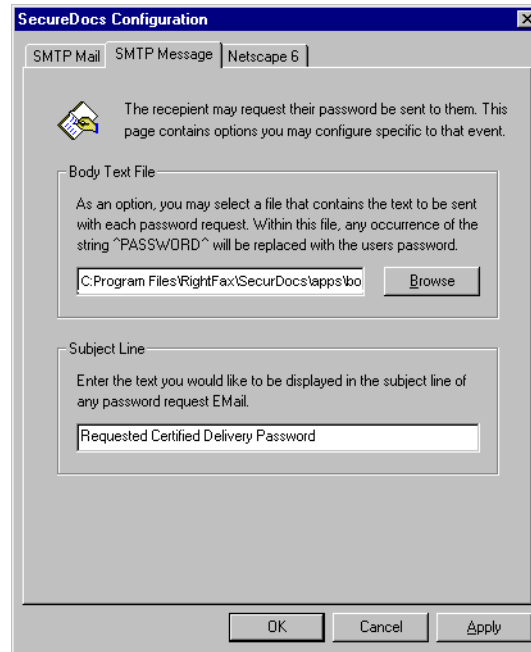
Recipients of documents via SecureDocs certified delivery must obtain passwords before they can view documents at the certified delivery Web site. If a user forgets the password, the SecureDocs Module sends the password in an e-mail message on request.

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

### To include a message

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

Figure 1.8 The SMTP Message Tab



3. In the **Body Text File** box, you can enter the file name and path to the file that contains unique message text for your installation. If you do not enter a file name, the default message is used. The default message is "Requested Certified Delivery Password: *password*." For information on creating a message file, see ["Creating the Message to Send with Passwords"](#) on page 16.
4. In the **Subject Line** box, enter the text that will appear in the subject line of the e-mail message.
5. Click **Apply**.

## Creating the Message to Send with Passwords

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

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

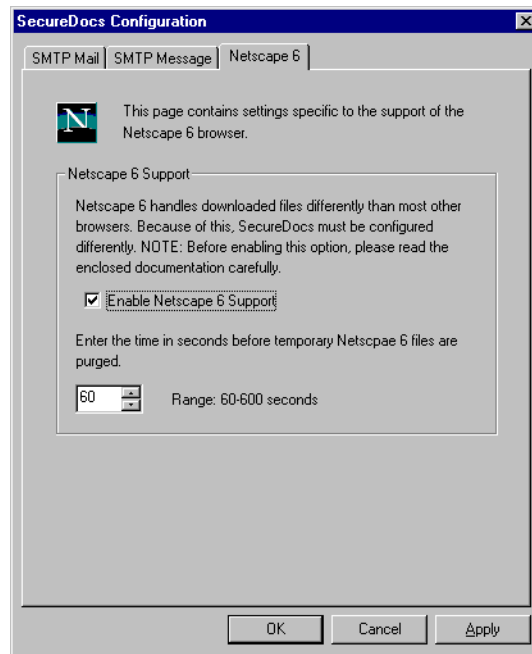
Store the text file in a folder that is accessible to the SecureDocs Module on the IIS server.

## Supporting Netscape 6

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

1. On the IIS server where the certified delivery Web site is installed, on the **Start** menu, select **Programs > SecureDocs Config**.
2. Click the **Netscape 6** tab.

Figure 1.9 The Netscape 6 Tab



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

## Modifying the SecureDocs Web Pages

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

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

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

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

Figure 1.10 A SecureDocs Web Page

**Inbox for craigpost@captaris.com**

Click on a document number to see more detailed information. To keep a copy of a document, print it or download it to your local computer. Documents may be deleted without notice.

▶ Indicates the currently active document.

Read	Document Number	Delete	Sender	Subject	Transmission Time
<input checked="" type="checkbox"/>	<a href="#">CRP3D074F834AE1</a>	<input type="checkbox"/>	craigpost@captaris.com		06/12/2002 - 13:41:40

Total Documents: 1      Total Pages: 1  
 Displaying Documents: 1 - 1      Delete selected documents      Query Took 0 minutes, 0 seconds

Current Page: 1

Copyright © 2001 Captaris, Inc  
 Wednesday, Jun 12, 2002  
 02:03:00 PM

## Creating a Message to Notify a Recipient of a Certified Delivery

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

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

Figure 1.11 The Default HTML Notification

**Certified Delivery Notification**

You have received a document through certified delivery.  
 To view the document, click the link below.

[Go to document](#)

**To create the message**

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

## Synchronizing the SecureDocs Database

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

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

**To synchronize the database**

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

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

**Table 1A SynchDB.exe Command Line Elements**

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

■ ■ ■

# Chapter 2

## Sending Documents for Certified Delivery with the Integration Module

**W**hen you send a certified document, the document is sent to your SecureDocs certified delivery Web site, and the recipient receives a notification that he or she can retrieve the document. This chapter explains how to send certified documents via the RightFax Integration Module. To e-mail a document, you must license the InternetLink Module.

### Understanding Certified Delivery Documents Created with FCL

Like other documents that the Integration Module processes, certified documents are comprised of FCL commands and document data from a host application. In addition to the standard FCL commands that are used to create a document, a document for certified delivery must include the `{{type certified}}` command and InternetLink FCL commands to address and send an e-mail message.

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

**Table 2A** Types of FCL Commands for Certified Delivery

Command	Description
<code>{{type certified}}</code>	This command identifies that the document should be sent for certified delivery.
InternetLink FCL commands, such as <code>{{to}}</code> and <code>{{from}}</code>	These commands specify the e-mail recipient, the sender, etc. For a complete list of InternetLink commands, see the <i>RightFax InternetLink Module Guide</i> .
Standard FCL commands, such as <code>{{begin}}</code> and <code>{{end}}</code>	These commands can specify a wide range of options. Some are required, and some are optional. For a complete list, see the <i>RightFax Integration Module Guide</i> .

## Creating Certified Documents with FCL

Creating a certified document with FCL is similar to creating an InternetLink document, except that you use the `{{type certified}}` command. Certified documents require four FCL commands.

The following table lists the required commands.

**Table 2B Required FCL Commands for Certified Delivery**

Command	Description
<code>{{begin}}</code>	Indicates the beginning of a document.
<code>{{end}}</code>	Indicates the end of a document.
<code>{{to}}</code>	The recipient's e-mail address.
<code>{{type certified}}</code>	Specifies that the document will be sent via certified delivery. The document will be sent to the SecureDocs certified delivery Web site, and the recipient will receive a notification that the document is available.

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

You can use any of the other InternetLink FCL commands in the FCL you use to create a certified document. This includes the `{{from}}` and `{{subject}}` commands, which override the settings that you created with the SecureDocs Configuration program (see "Installing the SecureDocs Module" on page 7).

## Selecting an Image Type

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

PDF is the most universal image type, and Captaris recommends that you use it for certified documents. The default format for certified documents is PDF. The examples in this chapter use the `{{imagetype}}` command.

### Understanding the `{{imagetype}}` Command

When used with the `{{type certified}}` command, `{{imagetype}}` selects the file format for the document.

**Syntax** `{{imagetype pdf|group3|group4}}`

**Example** `{{imagetype pdf}}`

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

## Attaching Documents

Attachments to the document will be converted with the same rules for attachments as InternetLink documents:

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

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

### Example FCL for Certified Documents That Have Attachments

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

```

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

```

In the following example, the host document data (“Here are last week’s programs.”) is converted to PDF and becomes page 1 of the document that is stored on the SecureDocs Web site. The attachment, Programs.xls, is converted to PDF and becomes page 2 of the document.

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

■ ■ ■

# Chapter 3

## Sending Documents for Certified Delivery from the RightFax Desktop

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

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

### **Sending from the RightFax Desktop**

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

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

**To send a document for certified delivery**

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

**Figure 3.1** Selecting the Use Certified Delivery Option

The screenshot shows the 'Fax Information' dialog box with the following details:

- Tab:** Main
- To:**
  - Name: Jane Doe
  - E-mail Address: jdoe@company.com
  - Voice Number: [Empty]
  - Company: [Empty]
  - City/State: [Empty]
  - Alt. Fax Number: [Empty]
- Options:**
  - Fine mode
  - Use cover sheet
  - Hold for preview
  - Use smart resume
  - Create PDF image
  - Use cheap rates
  - Delay send
- Accounting:**
  - Account: [Empty]
  - Matter: [Empty]
- Time/Date:**
  - Time: 1:50:50 PM
  - Date: 7/26/2001
- Buttons:** Send, Cancel

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

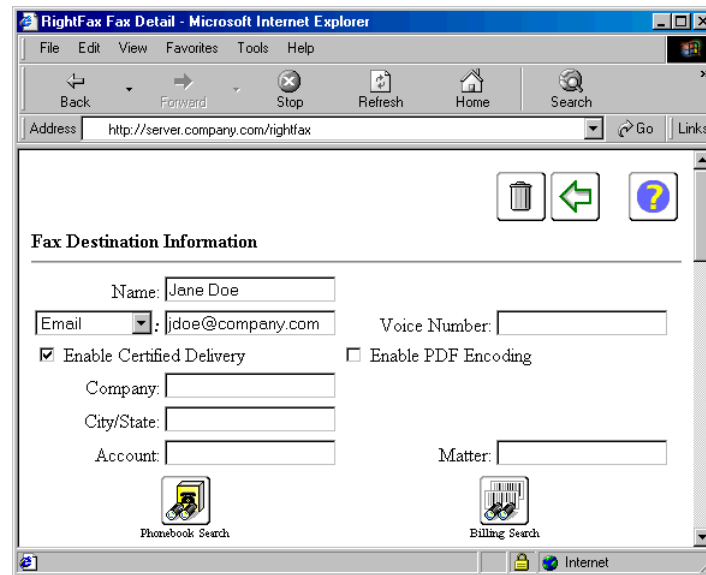
## Sending from the RightFax Web Client

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

For information on running the RightFax Web client, see the *RightFax Web Client Guide*.

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

Figure 3.2 Selecting the Enable Certified Delivery Option



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

## Deleting Documents

When a document is deleted from FaxUtil or from the Web Client, it will be deleted from the certified delivery Web site. If the recipient has not picked up the document, it will not be available after it has been deleted.

Similarly, documents that are deleted by the fax aging or another cleanup process will delete certified delivery documents from the certified delivery Web site.

■ ■ ■



# Chapter 4

## Viewing Documents at the Certified Delivery Web Site

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

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

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

**Figure 4.1 The Certified Delivery Logon Page**

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

3. The inbox appears.

Figure 4.2 The Inbox



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

■ ■ ■

# Chapter 5

## Sending Encrypted Documents

Encrypted documents are password-protected portable document format (PDF) files. Password protection ensures that your document can only be viewed by recipients to whom you have provided the required passwords.

To further protect the document, you can assign permissions to the PDF file. The following permissions can be assigned:

- Printing the document.
- Editing the content of the document.
- Copying or extracting the contents of the document.
- Annotating the document in Adobe Acrobat.
- Saving the document with a new file name.

You can send encrypted documents and assign permissions from a RightFax desktop application (such as FaxUtil) or via the Integration Module with FCL.

### Sending Encrypted Documents via the Integration Module

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

Table 5A Required FCL Commands for Encrypted PDFs

Command	Description
<code>{{begin}}</code>	Indicates the beginning of a document. The Integration Module will process all the data that appears between a <code>{{begin}}</code> and an <code>{{end}}</code> command as a discreet document. Data that does not appear between the <code>{{begin}}</code> and <code>{{end}}</code> commands is ignored. This command must appear as the first command in each FCL document. For more information on this command, see the <i>RightFax Integration Module Guide</i> .
<code>{{end}}</code>	Indicates the end of a document. The Integration Module will process all the data that appears between a <code>{{begin}}</code> and an <code>{{end}}</code> command as a discreet document. Data that does not appear between the <code>{{begin}}</code> and <code>{{end}}</code> commands is ignored. This command must appear as the last command in each FCL document. For more information on this command, see the <i>RightFax Integration Module Guide</i> .
<code>{{from}}</code>	Specifies the sender. For more information on this command, see the <i>RightFax InternetLink Module Guide</i> .
<code>{{pdfowner}}</code>	Specifies the owner's (sender's) password for the PDF.

Table 5A Required FCL Commands for Encrypted PDFs

Command	Description
<code>{{pdfuser}}</code>	Specifies the user's (recipient's) password and permission levels for the PDF.
<code>{{subject}}</code>	Specifies the <i>subject</i> line in the e-mail message that is sent. For more information on this command, see the <i>RightFax InternetLink Module Guide</i> .
<code>{{to}}</code>	Specifies the recipient's e-mail address. For more information on this command, see the <i>RightFax InternetLink Module Guide</i> .
<code>{{type certified}}</code> <code>{{type mime}}</code>	With <code>{{type certified}}</code> , the document is sent to the SecureDocs Web site as an encrypted PDF. With <code>{{type mime}}</code> , the document is sent as an encrypted PDF that is attached to an empty e-mail message. It is not sent to the SecureDocs Web site.

## Understanding the `{{PDF}}` Commands

**Syntax**`{{pdfowner "password"}}`

**Example**`{{pdfowner "qwerty16"}}`

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

**Syntax**`{{pdfuser "password" [permissions]>}}`

**Example**`{{pdfuser "#MNid4" 31}}`

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

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

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

Table 5B Bit Values for PDF Permissions

Bit	Permission	Notes
1	Print	The user can print the PDF. Example: <code>{{pdfuser "#MNid4" 1}}</code>
2	Edit	The user can edit the PDF. Example: <code>{{pdfuser "#MNid4" 3}}</code> This example sets print and edit permissions.
4	Select	The user can select and copy text. Example: <code>{{pdfuser "#MNid4" 7}}</code> This example sets print, edit, and select permissions.
8	Annotate	The user can add annotations. Example: <code>{{pdfuser "#MNid4" 15}}</code> This example sets print, edit, select, and annotate permissions.
16	Save As	The user can save the PDF to a new file name. Example: <code>{{pdfuser "#MNid4" 31}}</code> This example sets print, edit, select, annotate, and save as permissions.

### Example FCL for Encrypted PDF Documents

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

```

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

```

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

```

{{begin}}
Your account number is 16328182-GRZ
{{type mime}}
{{to las@oswego.com}}
{{subject Weekly programs}}
{{from css@oswego.com}}
{{pdfowner "qwerty"}}
{{pdfuser "#MNid4" 1}}
{{end}}

```

## Sending Encrypted Documents from the RightFax Desktop

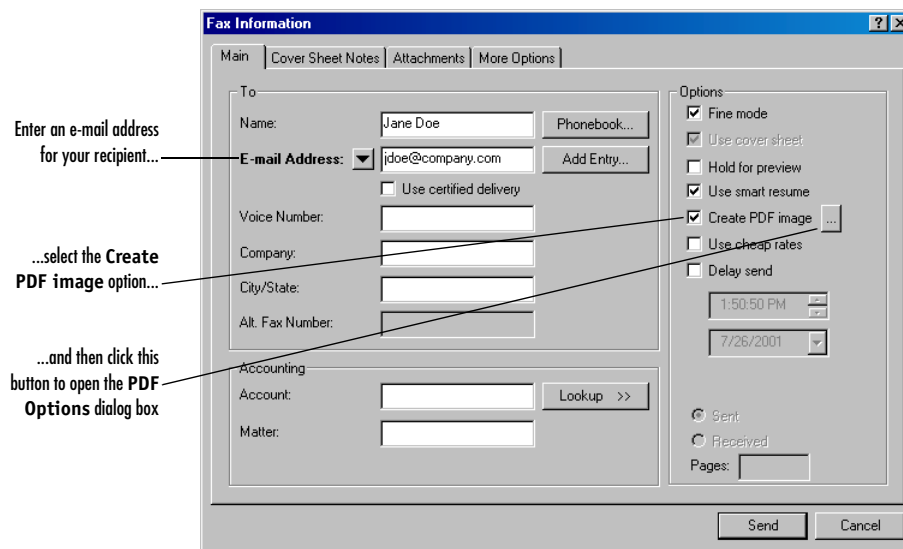
The options to create an encrypted PDF file are located in the **Fax Information** dialog box. This dialog box can be opened from any of the RightFax desktop applications including FaxUtil, the Quick Fax/Broadcast function on the RightFax tray icon shortcut menu, and the Send to Fax Destination via RightFax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

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

### To send an encrypted PDF

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

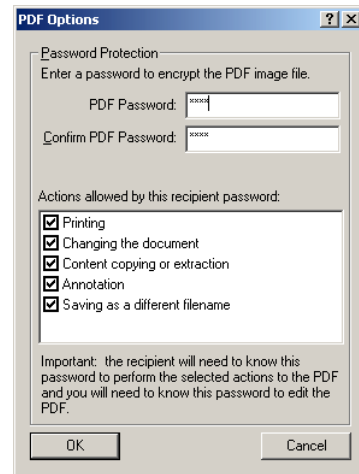
Figure 5.1 Selecting the PDF Option in the Fax Information Dialog Box



2. Under **To**, click the arrow next to **Fax Number** and select **E-mail Address** from the shortcut menu.
3. Enter the recipient's e-mail address.
4. Select the **Create PDF image** check box.

5. Click the [...] button next to **Create PDF image**. This opens the **PDF Options** dialog box.

**Figure 5.2 Assigning Permissions to an Encrypted PDF File**



6. In the **PDF Password** and **Confirm PDF Password** boxes, type the password. Adobe Acrobat, the program used to view PDF files, will prompt the recipient for this password each time the file is opened.
7. Under **Actions allowed by this recipient password**, select the permissions for the PDF file:
  - Printing the document.
  - Editing the content of the document.
  - Copying or extracting the contents of the document.
  - Annotating the document in Adobe Acrobat.
  - Saving the document with a new file name.
8. Click **OK** to close the **PDF Options** dialog box.
9. Complete the **Fax Information** dialog box, and then click **Send** to send the document.

## Receiving Encrypted Documents

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

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

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

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

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