



Version 9.0  
SecureDocs Module Guide

## Edition

Information in this document applies to version 9.0 Feature Pack 1 of the SecureDocs Module Guide.

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Captaris is a leading provider of Business Information Delivery solutions that integrate, process and automate the flow of messages, data and documents. Captaris produces a suite of proven products and services, in partnership with leading enterprise technology companies, delivered through a global distribution network. Captaris has installed over 80,000 systems in 44 countries, with 93 of the Fortune 100 using the company's award-winning products and services to reduce costs and increase the performance of critical business information investments. For more information please contact us at [www.captaris.com](http://www.captaris.com) or call +1.520.320.7000.

# Contents

Chapter 1	<b>Introduction.....</b>	<b>5</b>	Chapter 4	<b>Sending Documents for Certified Delivery from the RightFax Desktop.....</b>	<b>21</b>
	Sending Documents via Certified Delivery.....	5		Sending from the RightFax Desktop .....	21
	Sending Encrypted Documents.....	6		Sending From RightFax Web Access.....	22
Chapter 2	<b>Installing the SecureDocs Module.....</b>	<b>7</b>		Sending From Microsoft Outlook.....	22
	Minimum System Requirements .....	7		Deleting Documents .....	23
	Upgrading from RightFax Version 8.0 .....	7	Chapter 5	<b>Viewing Documents at the Certified Delivery Web Site.....</b>	<b>25</b>
	Upgrading from RightFax Version 8.5 .....	7	Chapter 6	<b>Sending Encrypted Documents.....</b>	<b>27</b>
	Activating the SecureDocs Module on the RightFax Server .....	8		Sending Encrypted Documents via the Integration Module .....	27
	Configuring the Certified Delivery Web Site .....	9		Sending Encrypted Documents from the RightFax Desktop.....	29
	Using Enterprise Fax Manager to Change Configurations .....	13		Receiving Encrypted Documents.....	31
	Modifying the SecureDocs Web Pages .....	14	Index.....		<b>33</b>
	Creating a Message to Notify a Recipient of a Certified Delivery.....	14			
	Synchronizing the SecureDocs Database .....	15			
Chapter 3	<b>Sending Documents for Certified Delivery with the Integration Module.....</b>	<b>17</b>			
	Understanding Certified Delivery Documents Created with FCL .....	17			
	Creating Certified Documents with FCL.....	18			
	Selecting an Image Type .....	18			
	Attaching Documents .....	19			



# Chapter 1

## 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.

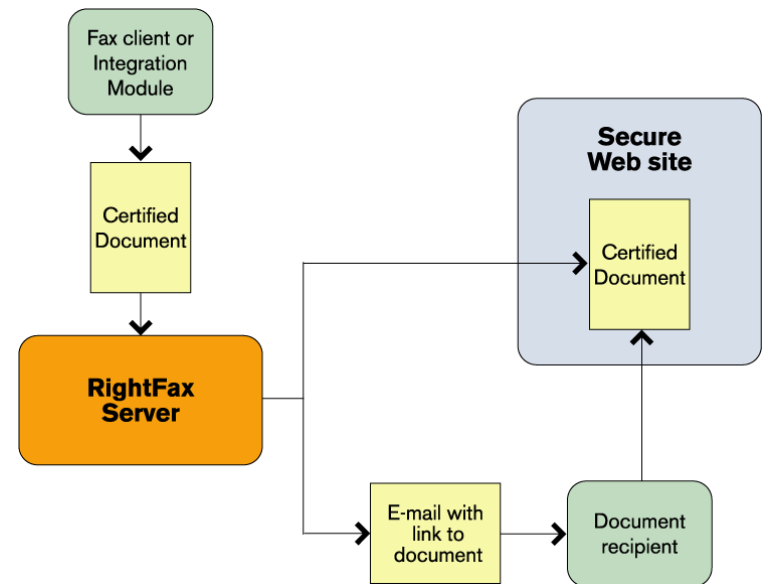
The SecureDocs Module can be used with RightFax desktop applications (such as FaxUtil or RightFax Web Access) or with the RightFax Integration Module.

### 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 on in order to view all waiting documents.

Figure 1.1 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 2

# 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 13](#).
- Customizing the SecureDocs certified delivery Web pages for your organization. See [“Modifying the SecureDocs Web Pages”](#) on [page 14](#).
- Synchronizing the database of recipient accounts that is maintained on the RightFax server. See [“Synchronizing the SecureDocs Database”](#) on [page 15](#).

## Minimum System Requirements

- For the SecureDocs certified delivery Web site, Microsoft Internet Information Server (IIS) version 5.0 or later.
- For sending documents via the Internet using the Integration Module, the InternetLink Module must be licensed and activated.

## Upgrading from RightFax Version 8.0

The installed file structures have changed since RightFax version 8.0. If you have installed and customized the pages of the SecureDocs certified delivery Web site for this version, you should save the pages in a separate folder before upgrading to a higher version of SecureDocs. If you do not save the pages, they will be replaced. The RightFax file path is:

C:\Program Files\RightFax\WebApps\SecureDocs.

The RightFax virtual directory is:

http:\*ServerName*\SecureDocs.

## Upgrading from RightFax Version 8.5

The RightFax 8.5 SecureDocs Module must be uninstalled before upgrading to RightFax 9.0. The earlier version of the SecureDocs Module uses an MSDE database that is not compatible with RightFax 9.0 and will cause installation to fail.

## Activating the SecureDocs Module on the RightFax Server

All of the software required to run the SecureDocs Module including certified delivery on the RightFax server is automatically installed when you install the server software. To enable all the features of the SecureDocs module, you only need to license its functionality. No separate installation is required. However, if you want to use the certified delivery feature, the RightFax certified delivery Web site must be installed separately on an IIS server. This is the Web site where sent documents are viewed by recipients. For information on this installation, see [“Installing the Certified Delivery Web Site”](#) on [page 8](#).

SecureDocs installs a database on the RightFax server for certified delivery user accounts and links to the 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.

### Installing the Certified Delivery Web Site

The server where the Certified Delivery Web site is installed must have be running Microsoft Internet Information Server (IIS) 5.0 or later.



**Tip** Servers running Microsoft Windows 2003 do not have IIS installed by default. On Windows 2003, IIS 6.0 must be selected as an optional component during the operating system installation

If you are installing Certified Delivery on a server running IIS version 6.0, you must change some of the default settings in the IIS configuration. These changes can be made either before or after you install Certified Delivery, but they must be completed before Certified Delivery will work on computers running IIS 6.0:

- In Internet Information Services Manager, **Active Server Pages** and **ISAPI Extensions** must be enabled. These features are enabled from the Web Service Extensions folder.
- Parent Paths must be enabled, either for the Default Web Site as a whole, or for the SecureDocs virtual directory which appears after the installation of Certified Delivery. Edit the properties of either of these sites and select the **Directory** tab. Click **Configuration**, open the **Options** tab, and select **Enable Parent Paths**.

### To install the Certified Delivery Web Site

Follow the instructions for installing the RightFax server in the *RightFax Installation Guide* and use the following specific steps:

1. On the **Setup Type** screen, select **Custom** and then click **Next**.
2. On the **Setup Features** screen, expand the **IIS** heading in the components tree and select the **Certified Delivery** component to install. Deselect all other installed components. Click **Next**.

3. On the **Advanced Options** screen, complete the following options:

**SMTP Host.** Specify the SMTP mail host for the following services.

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

**IIS User Account.** Enter an IIS user account that RightFax will use to access the IIS server. By default, the account information for the current user will be entered in this box.

**RightFax Server name.** Enter the name of the RightFax server on which SecureDocs is installed. Documents from this server may be sent via certified delivery.

4. Complete the remaining instructions in the *RightFax Installation Guide* for installing the RightFax server.
5. On the RightFax server, open the RightFax Server configuration program from Windows Control Panel. Click the eTransport tab and in the **SMTP Hostname** box enter the fully qualified domain name of the SMTP mail server used for sending messages.

## 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:.

## 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 10](#).
- 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 11](#).
- Support for Netscape 6. See [“Supporting Netscape 6”](#) on [page 12](#).

## 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 2.1 The SMTP Mail Tab

The screenshot shows a window titled "SecureDocs Configuration" with three tabs: "SMTP Mail", "SMTP Message", and "Netscape 6". The "SMTP Mail" tab is active. Inside the window, there is a globe icon and the text: "This page contains values specific to the delivery of SMTP EMail used in the SecureDocs process." Below this, there are two main sections. The first is "SMTP Host" with a text box containing "server.domain.com" and the instruction: "Enter the name of the SMTP host or gateway used to deliver your Internet EMail messages." The second section is "E-Mail Addresses" with two empty text boxes and the instruction: "Enter the Address you would like to use as the from address on any outgoing E-mails (example: SecureDocs@company.com)". At the bottom of the window are three buttons: "OK", "Cancel", and "Apply".

3. In the **SMTP Host** box, enter the name of the SMTP mail host that will send passwords from the SecureDocs certified delivery Web site.
4. In the first **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 2.2 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 12](#).
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

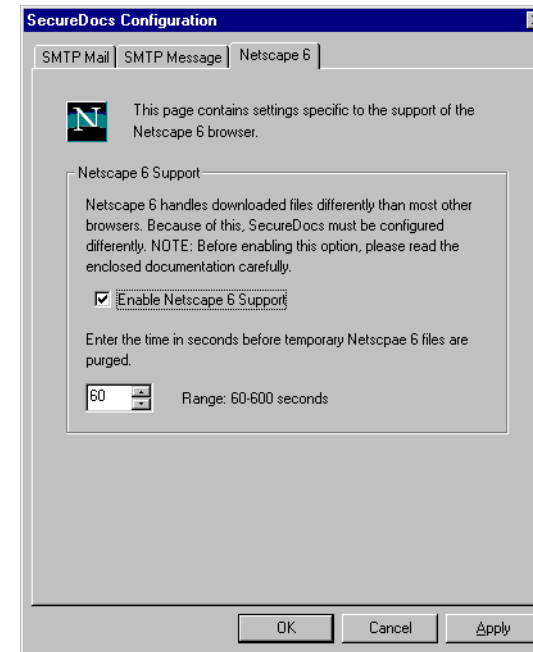


**Warning** Enabling Netscape 6 support might create a security risk. By default, the SecureDocs Module does not support Netscape 6 because of the way that Netscape 6 downloads files. Netscape 6 requires that the SecureDocs Web site create a temporary file on the Web server long enough for Netscape 6 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 2.3 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**.

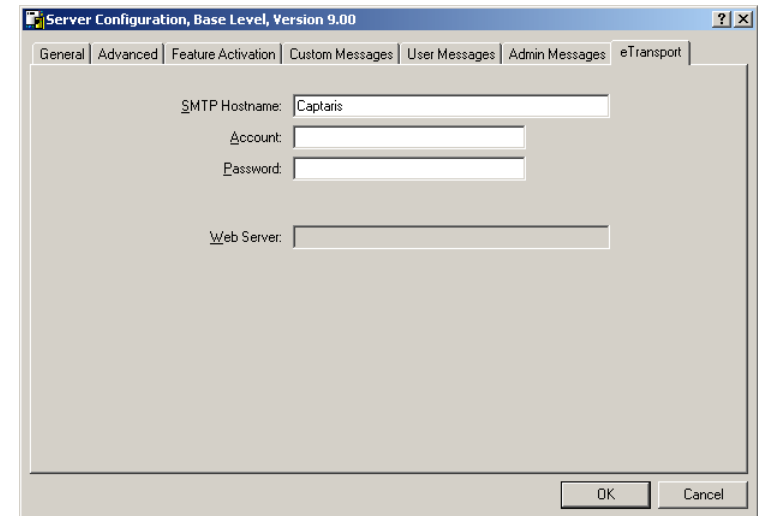
## Using Enterprise Fax Manager to Change Configurations

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 2.4 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.

## Modifying the SecureDocs Web Pages

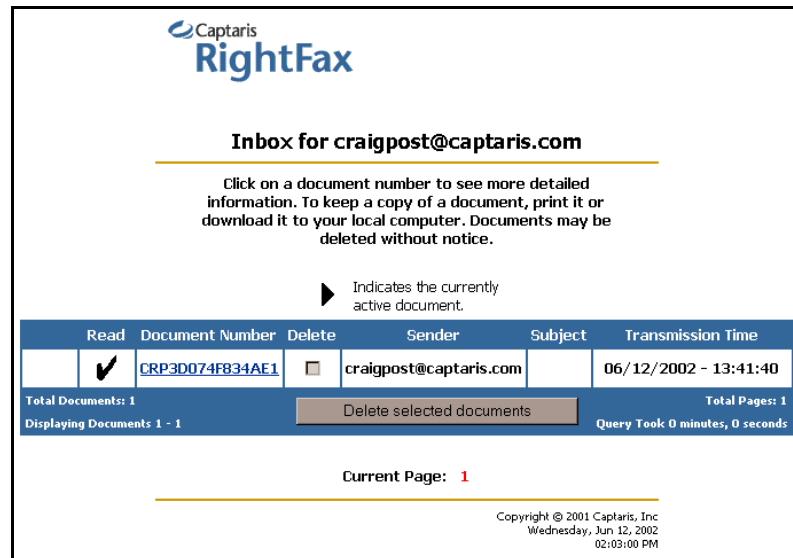
You can personalize the appearance of the SecureDocs certified delivery Web site. For example, you may want to add your company name, logo, or messages to the site.

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

The customizable 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 2.5 A SecureDocs Web Page

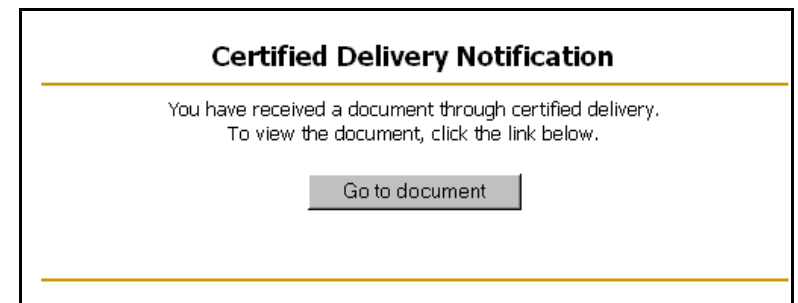


## Creating a Message to Notify a Recipient of a Certified Delivery

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 2.6 The Default HTML Notification



### To create the message

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

## Synchronizing the SecureDocs Database

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

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

### To synchronize the database

1. Locate the utility file SynchDB.exe in the directory RightFax\WebApps\SecureDocs\Apps.
2. The syntax is:  
**SynchDB** *RightFaxServer Protocol SecureDocs*.

The following table describes the data in the command line.

Table 2a SynchDB.exe Command Line Elements

Element	Description
<i>RightFax server</i>	The fully qualified domain name or TCP/IP address of the RightFax server to synchronize with.
<i>Protocol</i>	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)
<i>SecureDocs</i>	ODBC data source name of the SecureDocs database.

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## Chapter 3

# Sending Documents for Certified Delivery with the Integration Module

When you send a certified document, the document is sent to your SecureDocs certified delivery Web site, and the recipient receives a notification that he or she can retrieve the document. This chapter explains how to send certified documents 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 3a 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 3b 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 ["Activating the SecureDocs Module on the RightFax Server"](#) on page 8).

## 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}}
```

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## Chapter 4

# Sending Documents for Certified Delivery from the RightFax Desktop

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

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

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.

## **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*.

## To send a document for certified delivery

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

Figure 4.1 Selecting the Use Certified Delivery Option

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

- To:** Name: Jane Doe; E-mail Address: jdoe@company.com; Use certified delivery:
- Options:** Fine mode: ; Use cover sheet: ; Hold for preview: ; Use smart resume: ; Create PDF image: ; Use cheap rates: ; Delay send:
- Accounting:** Account: [ ]; Matter: [ ]
- 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 RightFax Web Access

When you send a document for certified delivery from the RightFax Web Access, 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 RightFax Web Access, refer to the *RightFax Installation Guide* and RightFax Web Access online help.

## Sending From Microsoft Outlook



**Note** The Advanced Form for Outlook currently supports sending via Certified Delivery only. Sending via SecureDocs will be supported in future versions. The Advanced Outlook form includes a SecureDocs options button which opens a dialog box containing sending options for SecureDocs. These options are currently unused and will not affect how documents are sent with Certified Delivery.

To send a document via Certified Delivery, the user must specify an e-mail address for the recipient instead of a fax number. The e-mail address can be entered in the **Fax Number/E-mail Address** box on the **Quick Fax Addressing** dialog box, or it can be entered in Outlook's **To:** or **Cc:** boxes.

In the **Quick Fax Addressing** dialog box, the user only needs to specify the recipient's name and e-mail address. After a name and e-mail address have been specified, the user must open the Advanced Outlook form and select the **Convert SMTP Addresses To SecureDocs Recipients** option. When this option is selected, the e-mail address specified in the **Quick Fax Addressing** dialog box will be converted to the proper format for sending via Certified Delivery.

If the user is not using the **Quick Fax Addressing** dialog box, the recipient's name and e-mail address must be entered in Outlook's **To:** or **Cc:** boxes using the following syntax:

**[RFAX:Name@/SMTP=EmailAddress/SD]**

Where *Name* is the recipient's display name and *EmailAddress* is the destination e-mail address. For example, to send a fax via Certified Delivery from Outlook to JaneDoe@Company.com, enter this address in the **To:** field:

[RFAX:Jane Doe@/SMTP=JaneDoe@Company.com/SD]

Documents sent to addresses formatted this way in Outlook will automatically be sent via Certified Delivery and the Advanced Outlook form is not required.

## Deleting Documents

When a document is deleted from FaxUtil or from RightFax Web Access, 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 5

# Viewing Documents at the Certified Delivery Web Site

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

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

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

Figure 5.1 The Certified Delivery Logon Page

**Captaris RightFax**

**Certified Document Delivery for las@oswego.com**

---

<p><b>Have an Account?</b></p> <p><b>Password:</b> <input type="text"/></p> <p>(6-10 Characters)</p> <p><a href="#">Click here to continue</a></p> <p>If you already have a password, type it in above and click this button to continue.</p> <p><a href="#">Tell me my password</a></p> <p>If you forgot your password, click this button and it will be emailed to you.</p>	<p><b>No Password?</b></p> <p><a href="#">Create account</a></p> <p>If you don't have a password, click this button to setup your account.</p>	<p><b>Change Password?</b></p> <p><a href="#">Change password</a></p> <p>If you already have a password and would like to change it, click this button.</p>
---	--	---

---

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Thursday, July 19, 2001  
12:20:21 PM

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.

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**.


■ ■ ■

Figure 5.2 The Inbox

**RightFax**

Inbox for las@oswego.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
	<a href="#">PROD1578</a>	<input type="checkbox"/>			Thu Jul 19 05:12:35 2001
✓	<a href="#">PROD1575</a>	<input type="checkbox"/>			Thu Jul 19 05:05:07 2001

Displaying documents 1 through 2      Total Documents 2

Current Page: **1**

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Thursday, Jul 19, 2001  
12:22:54 PM

## Chapter 6

# 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 6a 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> .

Table 6a Required FCL Commands for Encrypted PDFs (Continued)

Command	Description
{{end}}	Indicates the end of a document.  The Integration Module will process all the data that appears between a {{begin}} and an {{end}} command as a discreet document. Data that does not appear between the {{begin}} and {{end}} 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> .
{{from}}	Specifies the sender. For more information on this command, see the <i>RightFax InternetLink Module Guide</i> .
{{pdfowner}}	Specifies the owner's (sender's) password for the PDF.
{{pdfuser}}	Specifies the user's (recipient's) password and permission levels for the PDF.
{{subject}}	Specifies the <i>subject</i> line in the e-mail message that is sent. For more information on this command, see the <i>RightFax InternetLink Module Guide</i> .
{{to}}	Specifies the recipient's e-mail address. For more information on this command, see the <i>RightFax InternetLink Module Guide</i> .
{{type certified}} {{type mime}}	With {{type certified}}, the document is sent to the SecureDocs Web site as an encrypted PDF.  With {{type mime}}, 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 6b Bit Values for PDF Permissions

Bit	Permission	Notes
1	Print	The user can print the PDF. Example: {{pdfuser "#MNid4" 1}}
2	Edit	The user can edit the PDF. Example: {{pdfuser "#MNid4" 3}} This example sets print and edit permissions.
4	Select	The user can select and copy text. Example: {{pdfuser "#MNid4" 7}} This example sets print, edit, and select permissions.

Table 6b Bit Values for PDF Permissions (Continued)

Bit	Permission	Notes
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

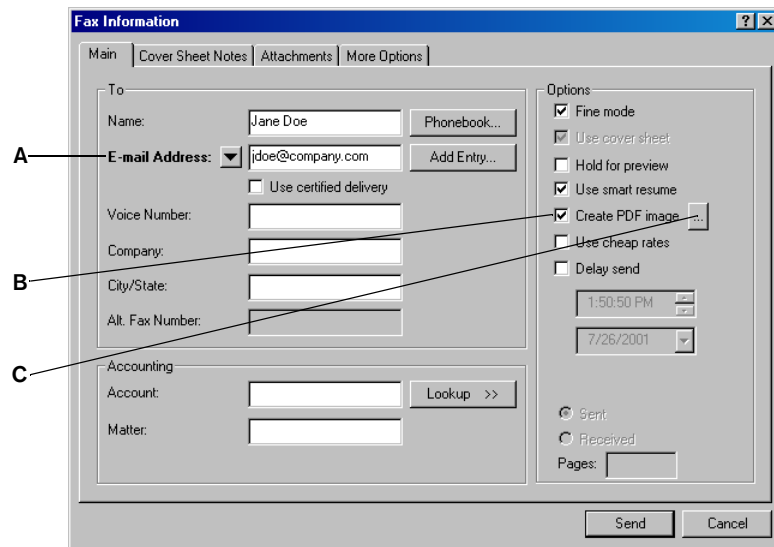
The options to create an encrypted PDF file are located in the **Fax Information** dialog box. This dialog box can be opened from any of the RightFax desktop applications including FaxUtil, the Quick Fax/Broadcast function on the RightFax tray icon shortcut menu, and the Send to Fax Destination via RightFax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

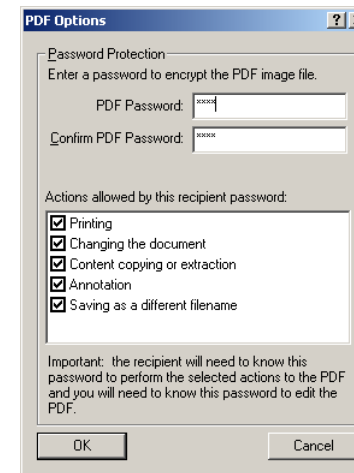
Figure 6.1 Selecting the PDF Option in the Fax Information Dialog Box



- A. Enter an e-mail address for your recipient.
  - B. Select the **Create PDF image** option.
  - C. Click this button to open the **PDF Options** 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 6.2 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 RightFax Web Access), 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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# Index

## A

- attachments
  - native files 19
  - using FCL 19

## C

- Certified Delivery 22-23
- certified delivery
  - image file types sent with the Integration Module 18
  - overview 5
  - sending from RightFax Web Access 22
  - sending from the Integration Module 17
  - sending from the RightFax desktop 21
- certified delivery email message to recipient 13
- certified delivery Web site
  - deleting documents 23
  - installing 8
  - logging on 26
  - modifying pages 14
  - Netscape support 12
  - password email message 10-12
  - viewing documents 25

## D

- deleting documents 23
- desktop, RightFax
  - deleting certified delivery documents from 23
  - sending documents for certified delivery 21
  - sending encrypted documents 29
  - sending password-protected documents 29

## E

- email message
  - to certified delivery recipient 13, 14
  - with certified delivery password 10-12
- encrypted documents
  - overview 6
  - sending from the RightFax desktop 29
  - sending with the Integration Module 27
  - setting permissions with FCL 28
- example FCL for documents that have attachments 19

## F

- FaxUtil, sending documents for certified delivery 21

## FCL

- attaching documents 19
- examples for documents that have attachments 19
- sending certified delivery with the Integration Module 17
- file format for certified delivery documents sent with the Integration Module 18

## I

- image file types for certified delivery 18
- IMAGETYPE command 18
- installing
  - certified delivery Web site 8
  - SecureDocs Module 8
- Integration Module, sending documents for certified delivery 17

## L

- logging on to the certified delivery Web site 26

**M**

- modifying
  - certified delivery Web pages 14
  - email message to certified delivery recipient 14

**N**

- native files, attaching 19
- Netscape 12

**O**

- overview
  - certified delivery 5
  - SecureDocs Module 5
  - sending encrypted documents 6

**P**

- password email message 10-12
- password-protected documents
  - sending from the RightFax desktop 29
  - viewing 31
- permissions for encrypted documents
  - setting from the RightFax desktop 29
  - setting with FCL 28

**Q**

- Quick Fax/Broadcast function, sending documents for certified delivery 21

**R**

- requirements, system 7
- RightFax desktop
  - deleting certified delivery documents from 23
  - sending certified delivery from 21

RightFax desktop (*continued*)

- sending encrypted documents from 29
- sending password-protected documents from 29

**S**

- SecureDocs database, synchronizing 15
- SecureDocs Module
  - installing 8
  - overview 5
- send faxes
  - using Certified Delivery 22-23
- Send To function, sending documents for certified delivery 21
- sending
  - certified delivery from RightFax Web Access 22
  - certified delivery from the RightFax desktop 21
  - certified delivery with the Integration Module 17
  - encrypted documents from the RightFax desktop 29
  - encrypted documents with the Integration Module 27
  - encrypted documents, overview 6
  - password-protected documents from the RightFax desktop 29
- SMTP mail host
  - for sending messages 9
  - for sending passwords 9
- SynchDB.exe 15
- synchronizing, SecureDocs database 15
- system requirements 7

**V**

- viewing documents at the certified delivery Web site 25
- viewing password-protected documents 31

**W**

- Web Access, sending documents for certified delivery 22
- Web site, certified delivery 8