Fax Sr. Filescan connector installation and configuration guide

For Genifax v3.3.1

omtool

Contents

CHAPTER 1: INTRODUCTION

About the Fax Sr. Filescan connector

The Fax Sr. Filescan connector, an add-in for the Genifax server, enables the Genifax server to process and deliver outbound faxes that were formerly processed by the Fax Sr. server.
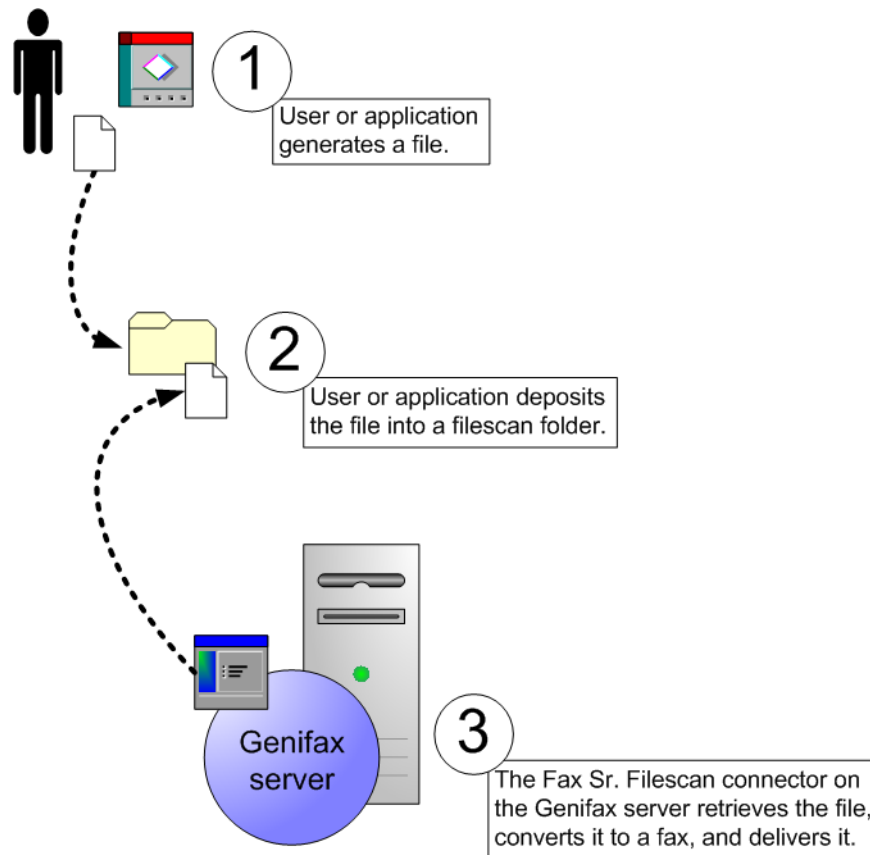
This special connector has been designed to interpret existing Fax Sr. filescan conventions accurately and efficiently. It is intended only for existing Omtool customers with Fax Sr. and Genifax.

Overview of the migration and deployment process

This guide contains information on migrating your existing filescan functionality from Fax Sr. to Genifax. The migration process includes:

- *Setting up folders* (p. 6): This section contains instructions on setting up filescan folders on the Genifax server and identifying the styles of operation associated with the filescan folders on the Fax Sr. server. When you configure the Fax Sr. Filescan connector, you need to know this information— the location of each filescan folder and its style of operation.

- *Setting up the connector on the Genifax server* (p. 8): This section illustrates how you install the Fax Sr. Filescan connector on the Genifax server, add the connector to the server via the Administrator, and add the filescan folders to the connector configuration. Note that as soon as you add the connector to the server, it is enabled by default and begins polling the filescan folders in the connector configuration.

- *Working with cover pages* (p. 17): Fax Sr. cover pages are not compatible with Genifax. Therefore, you must create new cover page templates using Genifax cover page conventions.

- *Working with bitmaps* (p. 19): Fax Sr. bitmap files are not compatible with Genifax. Therefore, you must convert bitmap files to PDF format.

- *Working with form definition files* (p. 27): The migration process involves moving all FRM files to the same directory on the Genifax server, configuring the connector with the location of the FRM files, associating FRM files with individual filescan folders (optional), and making sure that all keywords in FRM files are supported with the Fax Sr. Filescan connector.

- *Working with fonts* (p. 30): Before running the connector, you must verify that all instances of the #FONT keyword reference a supported font that exists in the Windows fonts directory on the system where the Composer is running.

- *Additional connector configuration* (p. 31): This section describes some optional configurations, such as configuring the Fax Sr. Filescan connector to move invalid control files to a special folder, and setting defaults for the connector.

- *Deploying the connector* (p. 34): After you choose whether you want to use the new filescan folders on the Genifax server or the original filescan folders on the Fax Sr. server, you must take some final measures to deploy the connector in your company's production environment.

> **Tip: For additional reference, consult the appendices and the glossary. The appendices contain a keyword reference (*Control file keywords*, p. 35) and instructions on setting Windows sharing and security permissions on filescan folders (*Setting sharing and security permissions on filescan folders*, p. 42).**

About this guide

This guide contains instructions on installing, configuring and deploying the Fax Sr. Filescan connector on the Genifax server.

Audience

This guide is written for a network administrator or IT professional. In order to complete the procedures described herein, you should have detailed knowledge of the Fax Sr. and Genifax servers. For Fax Sr., you should have an understanding of the Fax Sr. filescan application service, knowledge of the applications that generate faxes and control files, and the locations of the filescan folders. For Genifax, you should have a general understanding of the server and its connectors.

Use

The documentation and the connector are intended only for existing Omtool customers with Fax Sr. and Genifax.

Additional resources

Documentation

Genifax Administrator help

This help system is located online at http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm.

Fax Sr. administrative and user guide

This guide is located on the Fax Sr. server in …\FaxSr\Documentation\FaxSrManuals.

Technical support

Toll-free in the United States: (888) 303-8098
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Customer service

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CHAPTER 2: REQUIREMENTS

Before you proceed, verify that you have the following:

☐ Fax Sr. server (any version)

☐ Genifax server v3.3.1 SR2 or later

Then proceed to the next section.

CHAPTER 3: SETTING UP FOLDERS

Before you install the Fax Sr. Filescan connector, complete the following sections:

- ☐ *Identifying Fax Sr. filescan folders and their styles of operation*, p. 6
- ☐ *Creating filescan folders on the Genifax server*, p. 6

Identifying Fax Sr. filescan folders and their styles of operation

Before you create filescan folders on the Genifax server, print the filescan.dat file on the Fax Sr. server. It contains a list of the filescan folders you use with Fax Sr. and their styles of operation[1].

To print filescan.dat:

1. Log on to the Fax Sr. server and navigate to …\faxsr\. (This is the directory where the Fax Sr. program files are located.)

2. Open FileScan.dat in Notepad.

3. Verify that this file contains a list of Fax Sr. filescan folders and their styles of operation. For example, `^ HEADER ^ C:\FaxSr\filescan ^` indicates that `HEADER` is the style of operation and `C:\FaxSr\filescan` is the location of the folder.

4. Print the file.

Proceed to the next section and use the list of filescan folders to create filescan folders on the Genifax server.

Creating filescan folders on the Genifax server

Create a filescan folder on the Genifax server for every filescan folder you use with Fax Sr.

Having filescan folders on the Genifax server enables you to test the Fax Sr. Filescan connector configuration without disrupting outbound fax activity in your production environment.

After you configure the connector and send test faxes through the filescan folders on the Genifax server, you can decide whether you want the Fax Sr. Filescan connector to poll the original filescan folders on the Fax Sr. server or the new filescan folders on the Genifax server where you tested the connector configuration. If you decide to use the new filescan folders on the Genifax server, you must configure the applications that generate outbound faxes to use the new filescan folders. This is covered in *Deploying the connector* on page 34.

Tip: **Use the filescan.dat file you printed in the previous section. When finished, do not discard the list. You need it again later when you configure the Fax Sr. Filescan connector to monitor the filescan folders.**

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1. The Fax Sr. Filescan connector supports the following styles of operation: EMBED, FAX#, FAX_#, GETPAID, HEADER, MULTIPLE, NUMBER, and PEOPLESOFT.

To create filescan folders on the Genifax server:

  1. Log on to the Genifax server and launch Windows Explorer.

  2. Go C:\ and create C:\faxsr\filescan.

  3. Create each filescan folder under C:\faxsr\filescan\. For example: C:\faxsr\filescan\header

Proceed to the next section and set up the Fax Sr. Filescan connector on the Genifax server.

CHAPTER 4: SETTING UP THE CONNECTOR ON THE GENIFAX SERVER

To set up the connector on the Genifax server, complete the following sections:

Downloading the connector

If you do not have the Fax Sr. Filescan connector setup, download it now using the following procedure.

To download the Fax Sr. Filescan connector:

1. Log on to the Genifax server and start the Administrator.

2. Click **Omtool Web Center** in the console tree. The Omtool Web Center loads in the details pane.

3. Click **Downloads & Docs** in the left-side navigation pane. (It is located under *Support.*)

4. Click the drop-down menu at the top of the page, go to the *Updates* section of the menu, and select the Fax Sr. Filescan connector. A description of the connector appears in the browser.

5. Click the download link to begin downloading the connector. When the *File Download* dialog box appears and Internet Explorer prompts you to run the program from its current location or save it to disk, select the **Save this program to disk** option and click **OK**. Navigate to the folder where you want to save the download and click **Save**. Internet Explorer downloads the file and saves it to the location you specified.

6. Exit the Administrator.

Proceed to the next section and install the connector on the Genifax server.

Installing the connector on the Genifax server

To install the Fax Sr. Filescan connector on the Genifax server:

1. Log on to the Genifax server and verify that the Administrator is not running.

2. Navigate to the folder where you saved the download, and double-click **GenifaxFaxSrFilescan.exe**.

3. Click **Continue**. The self-extracting executable launches the installer, and the *Welcome* screen appears.
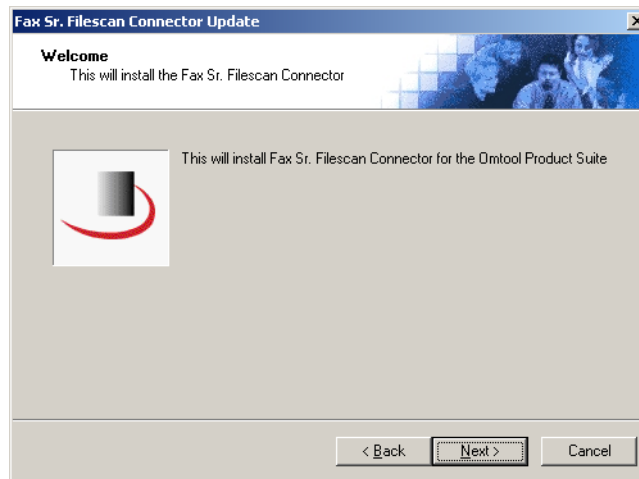
4. Click **Next**. The *Detect Components* screen displays the components to be updated during the installation.
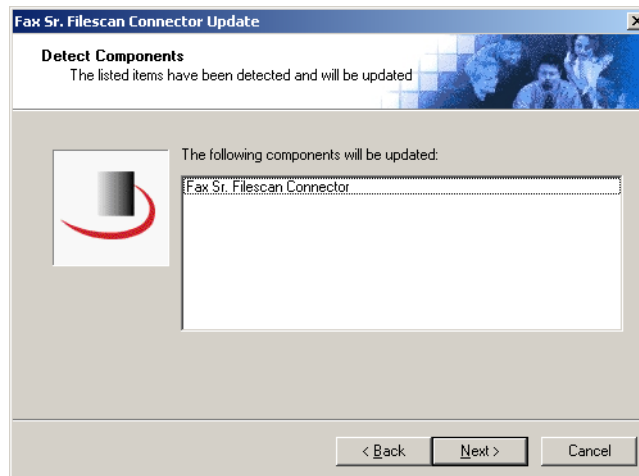
5. Click **Next**. After the installer has finished updating the required components, the *Installation Completed* screen appears.
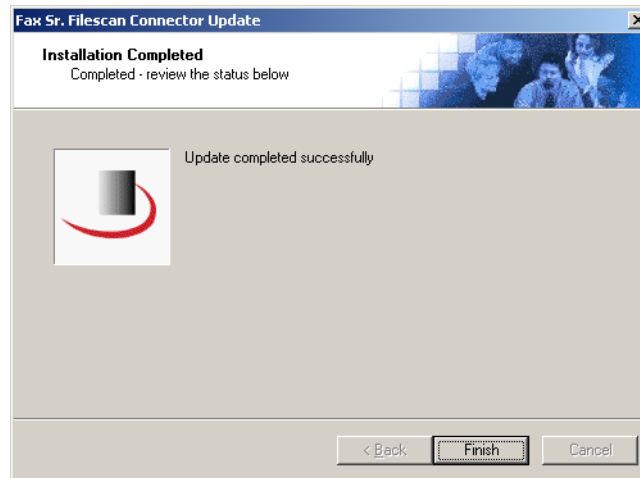
6. Click **Finish**.

You have installed the connector files. Proceed to the next section and add the Fax Sr. Filescan connector to the Genifax server.

Adding the connector to the Genifax server

To add the Fax Sr. Filescan connector to the Genifax server:

1. Start the Administrator.
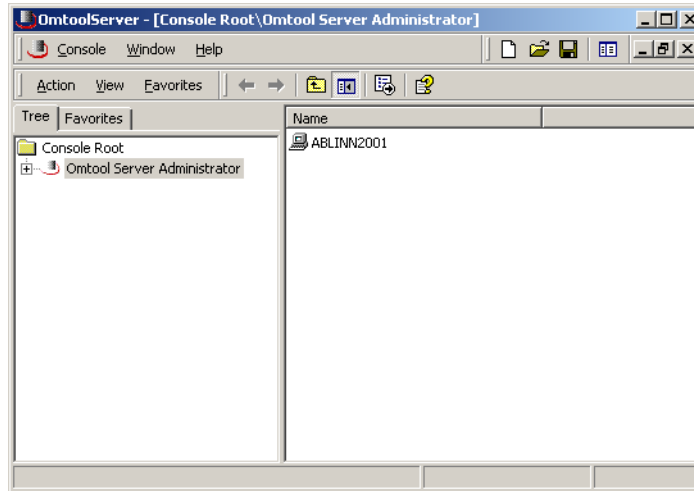
2. Right-click **Connectors** in the console tree and select **New** > **Fax Sr. Filescan**.
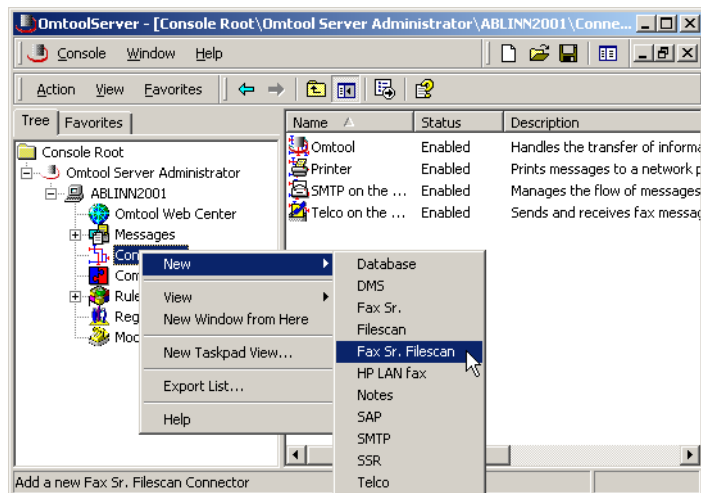
Note: **Be sure that you select "Fax Sr. Filescan" in the new connector menu. If this option does not appear in the new connector menu, the connector is not installed correctly on the Genifax server.**

The new connector wizard displays the *Display Name* screen.
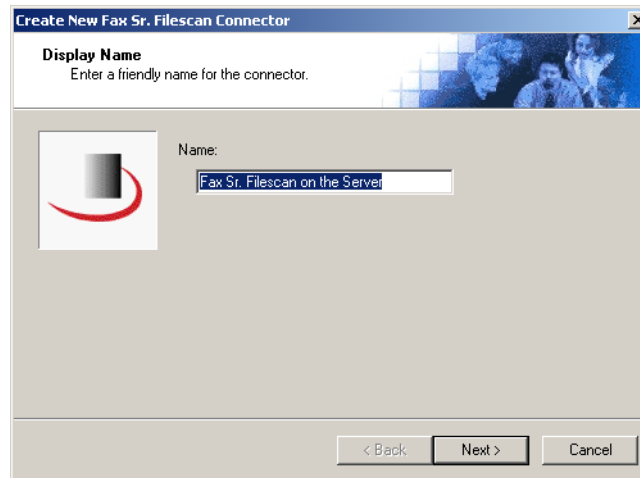
3. Type a friendly name for this connector in the *Name* text box and click **Next**. The *Fax Sr. Filescan* screen appears.
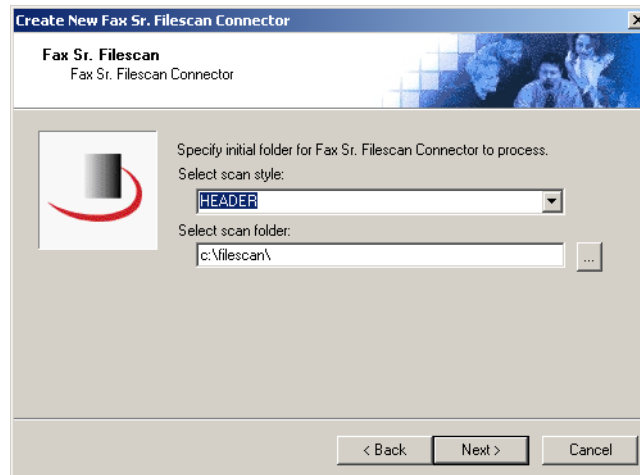
4. Choose the filescan folder[1] that you want to add to the Fax Sr. Filescan connector configuration[2]. (Use your printed copy of the filescan.dat file to identify the style of operation associated with the filescan folder.[3])

   Select the style of operation for this filescan folder from the *Select scan style* drop-down menu. Then provide the local path[4] to the filescan folder on the Genifax server. Click the browse button, navigate to the directory[5], select it, and click **OK**. Then click **Next**. The default originator screen appears.

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1. If you did not create any filescan folders on the Genifax server, go to *Creating filescan folders on the Genifax server* on page 6 and then complete the installation.
2. After you add the Fax Sr. Filescan connector to the Genifax server, you can add more filescan folders to the connector configuration.
3. See *Identifying Fax Sr. filescan folders and their styles of operation* on page 6.
4. If the filescan folder is located on a local drive such as the C:\ drive, use a local path such as `C:\faxsrfilescan\scan_east`. Otherwise use a UNC path such as `\\<server>\<share>`. Do not use drive letter mappings to other systems in the network—this is not supported.
5. The Filescan directory is a shared directory so you should be able to browse to the folder from the Genifax server.
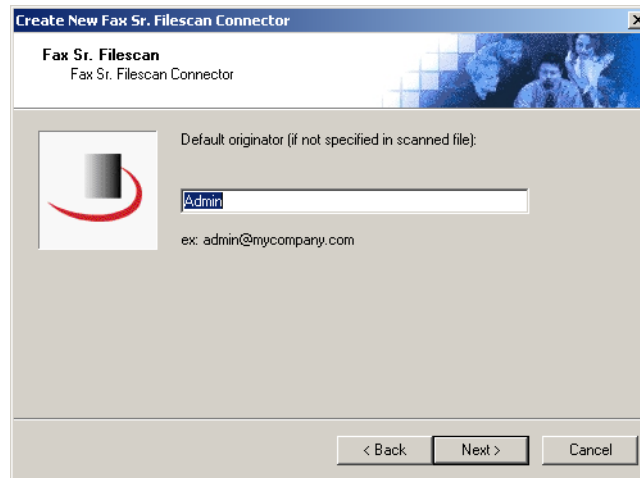
5. Type the e-mail address of the default originator[6] in the *Default originator* text box.

Note: By default, this screen displays "Admin" as the default originator. If you want to set a default originator for the connector, you must provide a valid e-mail address.

Then click **Next**. The *Congratulations* screen appears.
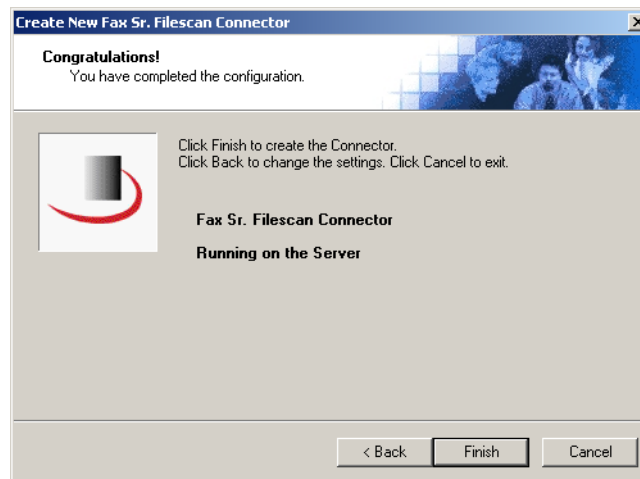
6. Click **Finish**. The new connector wizard saves the configuration data and creates the connector.

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6. The Genifax server associates an originator e-mail address with all outbound faxes. If an outbound fax does not contain an originator e-mail address, the server associates the e-mail address of the default originator with the outbound fax, and uses this e-mail address for notification messages.
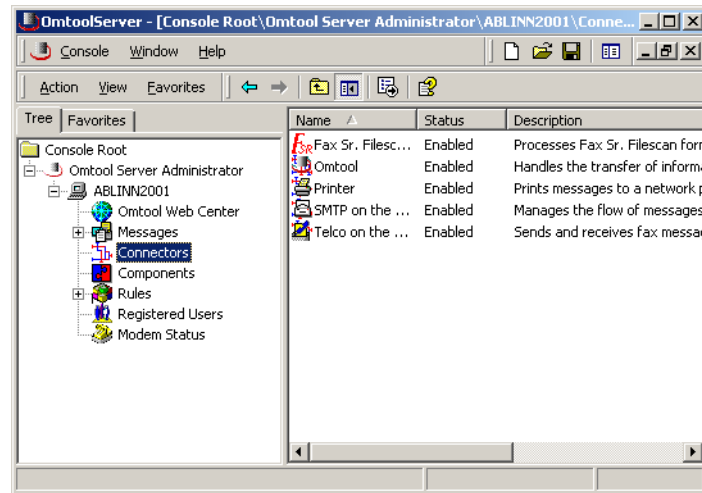
7. Verify that the connector appears in the *Connectors* details pane.

You have added the Fax Sr. Filescan connector to the Genifax server, and it is enabled by default.

Proceed to the next section and add the rest of your filescan folders to the Fax Sr. Filescan connector configuration.

Adding more filescan folders to the connector configuration

Once you add the Fax Sr. Filescan connector to the Genifax server, the connector begins monitoring the filescan folder. If you have additional filescan folders that you want to add to the connector configuration, add them now using the following procedure.

> *Tip:* **Before you proceed, make sure you have your printed copy of filescan.dat file. (See** *Identifying Fax Sr. filescan folders and their styles of operation* **on page 6.)**

To add a filescan folder to the connector configuration:

1. Verify that the Administrator is running.

2. Click **Connectors** in the console tree and double-click the Fax Sr. Filescan connector in the details pane. The *Properties for Fax Sr. Filescan on the Server* dialog box appears.

3. Click the **Folders to scan** tab.
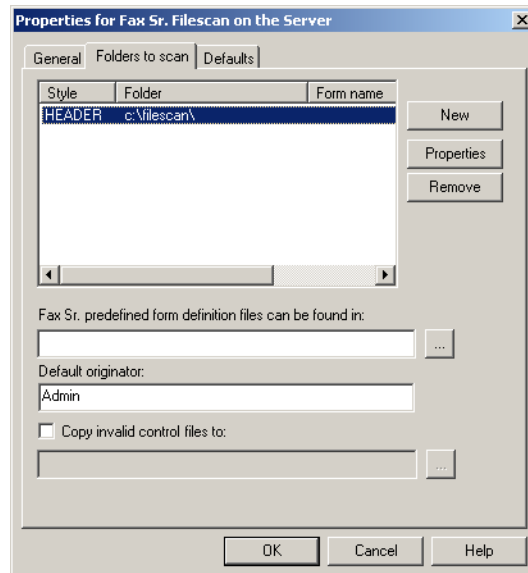
4. Click **New**. The *Folder* dialog box appears.
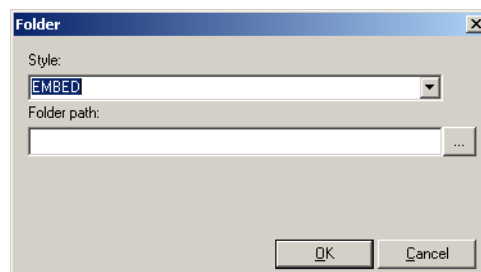
5. Select the style of operation for this filescan folder from the *Style* drop-down menu. (Use your printed copy of the filescan.dat file to identify the style of operation associated with the filescan folder.[7])

   Go to the *Folder path* text box and provide the local path[8] to the filescan folder on the Genifax server. Click the browse button, navigate to the directory, select it, and click **OK**.

6. Click **OK** to close the *Folder* dialog box.

7. Click **OK** to save your changes to the connector configuration.

Repeat this procedure to add more filescan folders to the connector configuration. Then proceed to the next section.

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7. See *Identifying Fax Sr. filescan folders and their styles of operation* on page **6**.
8. If the filescan folder is located on a local drive such as the C:\ drive, use a local path such as `C:\faxsrfilescan\scan_east`. Otherwise use a UNC path such as `\\<server>\<share>`. Do not use drive letter mappings to other systems in the network. The Fax Sr. Filescan connector runs as a Windows service, and Windows services cannot access mapped drives.

Special instructions for Remote Composers or Remote Administrators

When the Genifax environment includes a Remote Composer or Remote Administrator, complete the additional steps listed in this section.

Remote Composer

After you have installed the Fax Sr. Filescan connector on the Genifax server, copy the files in the following table using the instructions provided. (Note that it is *not* necessary to register any of the DLL files after copying them to the system running Remote Composer.)

File that must be copied	Copy details
OmComGFActivePDFU.EXE	Copy from …\OmtoolServer\Vendors\OLE_ActivePDF on the Genifax server to …\OmtoolServer\Vendors\OLE_ActivePDF on the system running Remote Composer.
OmfGFDataSourcesU.DLL	Copy from …\OmtoolServer\Bin on the Genifax server to …\OmtoolServer\Bin on the system running Remote Composer.
omuGFFileu.DLL	Copy from …\OmtoolServer\Bin\ on the Genifax server to …\OmtoolServer\Bin\ on the system running Remote Composer.
1.TTF	Copy from the Windows fonts directory on the Genifax server to the Windows fonts directory on the Remote Composer.
11.TTF	
14.TTF	
40.TTF	
994.TTF	
998.TTF	

Remote Administrator

After you have installed the Fax Sr. Filescan connector on the Genifax server, copy OmAdmExtGFFSR2GFXU.DLL from …\OmtoolServer\Bin\ on the Genifax server to …\OmtoolServer\Bin\ on the system running Remote Administrator. (Note that it is *not* necessary to register this DLL file after copying it to the system running Remote Administrator.)

CHAPTER 5: WORKING WITH COVER PAGES

This chapter contains instructions on migrating your cover pages from Fax Sr. to Genifax.

Overview of cover pages and the Fax Sr. Filescan connector

The Fax Sr. Filescan connector supports Genifax cover pages only. Fax Sr. cover pages are not compatible with the Fax Sr. Filescan connector.

Genifax has the following cover page requirements:

- The cover page template files must be located on the Genifax server in …\Omtool\OmtoolServer\Languages\ENU\Templates\.

- Cover page template files must be saved in one of the following file formats: OMTPL[1], RTF, DOC, HTM, or HTML. (CVR is not supported.)

- Cover pages consist of static text and variables. Variables must be enclosed in percent symbols.

Note: The Fax Sr. Filescan connector supports all native Genifax cover page variables[2]. Native Fax Sr. cover page variables are not supported, but some of these variables might be compatible with the connector. To determine whether native Fax Sr. cover page variables are compatible with the connector, send test faxes that include a cover page and check the rendered cover page to determine whether the variables composed correctly.

It is not necessary to modify the #COVER keyword in your control files. When the Fax Sr. Filescan connector parses the #COVER keyword, the server ignores the CVR file extension and attempts to locate the cover page template file in this order: (1) OMTPL, (2) RTF, (3) DOC, (4) HTM, and (5) HTML. For example, when the control data includes `#COVER Coverpage.CVR`, the server ignores the CVR file extension and attempts to locate Coverpage.omtpl, Coverpage.rtf, Coverpage.doc, Coverpage.htm, or Coverpage.html (in this particular order). If none of these files exist in …\Omtool\OmtoolServer\Languages\ENU\Templates\, the server fails the outbound fax.

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1. This unique file extension denotes a cover page template file on the Omtool server. The template is rich text formatted and saved with an OMTPL extension.
2. For a complete list of Genifax variables, go to …\Omtool\OmtoolServer\Languages\ENU\Templates\ and open CoverPageVar.rtf.

Migrating cover pages from Fax Sr. to Genifax

To migrate cover pages from Fax Sr. to Genifax:

☐ Move all Fax Sr. cover pages to …\Omtool\OmtoolServer\Languages\ENU\Templates\ on the Genifax server.

☐ Open each cover page in Wordpad and review the contents. All text should be the static text that appears on the resulting cover page, and all variables should be enclosed in percent symbols (for example, %SENDER_NAME%). For additional information on creating Genifax cover page templates, consult the <u>Administrator help</u>.

☐ Save the cover page template file as *.OMTPL or *.RTF.

☐ Send a Quick Fax. This allows you to see a real cover page that the Genifax server has composed. For information on sending a Quick Fax, consult the <u>Administrator help</u>.

These migration checkpoints instruct you to migrate CVR files to OMTPL or RTF format. Keep in mind that you can also create your own cover page template files in any of the supported file formats:

- **OMTPL** — Omtool template file in rich text. Create OMTPL files using Wordpad.

- **RTF** — Rich text format. Create RTF files using Wordpad.

- **DOC** — Microsoft Word document. Create DOC files using Microsoft Word.

- **HTM/HTML** — Hypertext markup language. Create HTM/HTML files using an HTML editor or simple text editor.

For additional information on creating Genifax cover page templates, consult the <u>Administrator help</u>[3].

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3. Navigate to *Getting started > Customizing templates > Cover pages.*

CHAPTER 6: WORKING WITH BITMAPS

Before you can use bitmaps with the Fax Sr. Filescan connector, you must convert bitmap images to PDF files. Complete the two-step conversion process[1]:

☐ *Converting bitmaps from BM to TIF format* (p. 19)

☐ *Converting bitmaps from TIF to PDF format* (p. 20)

> *Tip:* **As an alternative to the TIF to PDF conversion, you may convert files from TIF to PDF format using an application that writes PDF files.**

Converting bitmaps from BM to TIF format

> *Note:* **In order to complete this procedure, all bitmaps must be located in …\faxsr\bitmap\ on the Fax Sr. server. Additionally, all bitmaps must have a BM file extension.**

To convert a BM file into a TIF file:

1. Log on to the Fax Sr. server.

2. Create the following directory: `…\faxsr\migrate\`

3. Copy all bitmaps from …\faxsr\bitmap\ to …\faxsr\migrate\.

4. Open a command prompt and set the directory[2] to …\faxsr\migrate\.

5. Type `…\faxsr compose <source_filename>.bm <target_filename>.tif` and press **ENTER**. (As you type this command, replace `<source_filename>` with the actual name of the bitmap file you want to convert, and replace `<target_filename>` with the same filename.)

6. Browse to …\faxsr\migrate\ and open the TIF file in an image editing application. If the bitmap should be landscape, rotate the image 90 degrees right, and save it.

Repeat this procedure to convert additional BM files to TIF format.

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1. The *.BM to *.TIF conversion is required; the *.TIF to *.PDF conversion is recommended. If you do not perform this additional conversion, the Composer on the Genifax server must perform this conversion on the fly every time an outbound fax utilizes a bitmap image.
2. For help on changing directories using the command prompt, type `cd /?` and press **ENTER**.

Converting bitmaps from TIF to PDF format

To convert a bitmap from TIF to PDF format, complete the following sections:

1. *Configuring the Filescan connector to use c:\filescan\out* (p. 20)

2. *Setting up a rule that routes the Quick Fax to c:\filescan\out* (p. 21)

3. *Sending the Quick Fax* (p. 25)

4. *Moving the PDF file to …\Omtool\OmtoolServer\forms* (p. 26)

These steps enable you to send a Quick Fax to a filescan folder so that the server will deliver the Quick Fax and routes it to the filescan folder as a PDF file.

Configuring the Filescan connector to use c:\filescan\out

In order to convert bitmaps from TIF to PDF format, the Genifax server must have a Filescan connector that has been configured to use c:\filescan\out. Complete one of the following sections:

- If the Genifax server does not have a Filescan connector, go to *Adding a Filescan connector and configuring it to use c:\filescan\out* on page 20.

- If the Genifax server has a Filescan connector, proceed to the next section.

Configuring an existing Filescan connector to use c:\filescan\out

To configure an existing Filescan connector to use the destination folder for new PDF files:

1. Start the Administrator, and expand the items in the console tree if necessary.

2. Click **Connectors** in the console tree and double-click the Filescan connector in the details pane. The *Properties for Filescan on the Server* dialog box displays the general properties of the connector.

3. Click the **Folders** tab. The *Properties for Filescan on the Server* dialog box displays the folders associated with the connector.

4. Click **New**. The *New Folder* dialog box appears.

5. Type `c:\filescan\out` in the *Folder to scan* text box and click **OK**. The new folder appears in the list.

6. Click **OK** to save your changes to the connector.

Keep the Administrator running and proceed to *Setting up a rule that routes the Quick Fax to c:\filescan\out* on page 21.

Adding a Filescan connector and configuring it to use c:\filescan\out

To add a Filescan connector to the Genifax server and configure it to use the destination folder:

1. Start the Administrator, and expand the items in the console tree if necessary.

2. Right-click **Connectors** in the console tree, and select **New** > **Filescan**. The new connector wizard displays the *License* screen.

3. Verify that your server license key appears in the text box. (Add the server license key if necessary.) Then click **Next**. The *Display Name* screen appears.

4. Accept the default name for the connector, and click **Next**. The *Filescan Folder* screen appears.

5. Type `c:\filescan\out` in the *Specify a folder to scan* text box, and click **Next**.

The *Congratulations* screen appears.

6. Click **Finish**. Verify that the Filescan connector appears in the *Connectors* details pane.

Keep the Administrator running and proceed to the next section.

Setting up a rule that routes the Quick Fax to c:\filescan\out

To set up a rule that routes the Quick Fax to the destination folder:

1. Expand **Rules** in the console tree. The items *Inbound* and *Outbound* should appear below *Rules*.

2. Right-click **Outbound** in the console tree, and select **New** > **Rule**. The *Create New Rule* screen appears.
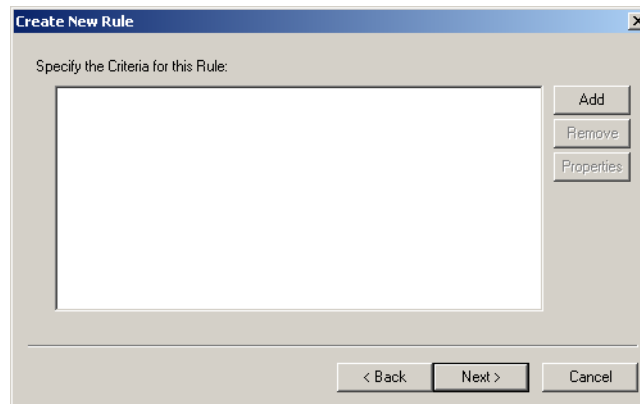
3. Click **Add**. The *Add Rule Criteria* screen displays the routing criteria you can select.
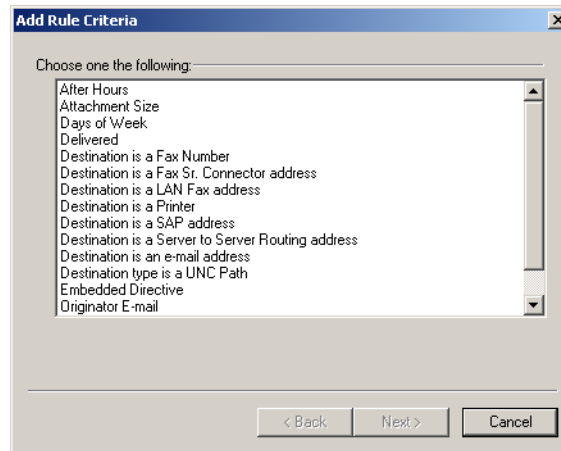
4. Select **Destination is a Fax Number** and click **Next**. The *Items to Match* screen appears.
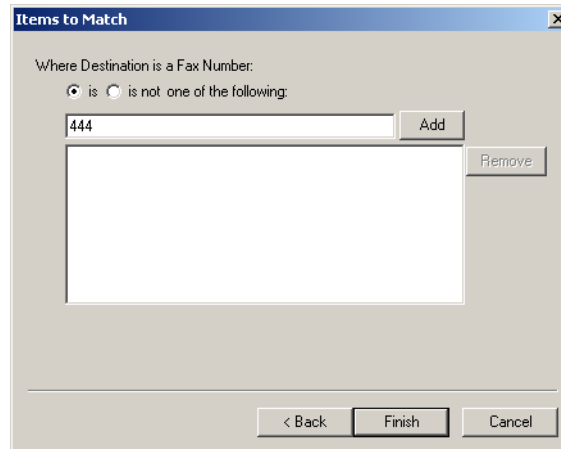
5. Type 444 in the text box (*shown above*), click **Add**, and click **Finish**. The criteria appears in the *Create New Rule* screen.
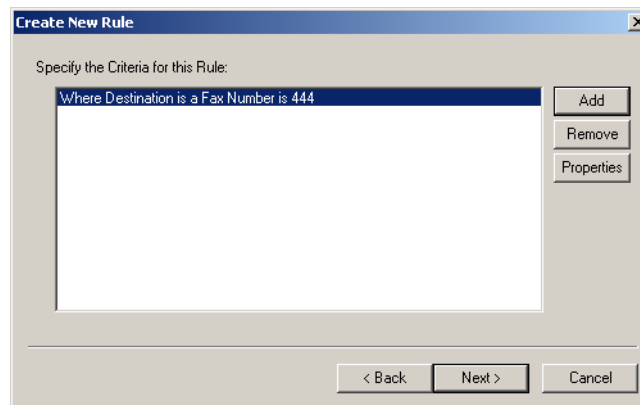
6. Click **Next**. The *Create New Rule* screen displays the actions for items that meet the criteria you specified in the previous step.
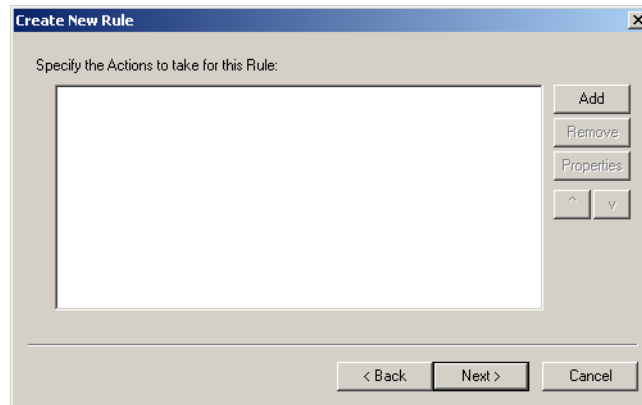
7. Click **Add**. The *Add Rule Action* screen displays the actions you can select for items that meet the criteria you specified in a previous step.
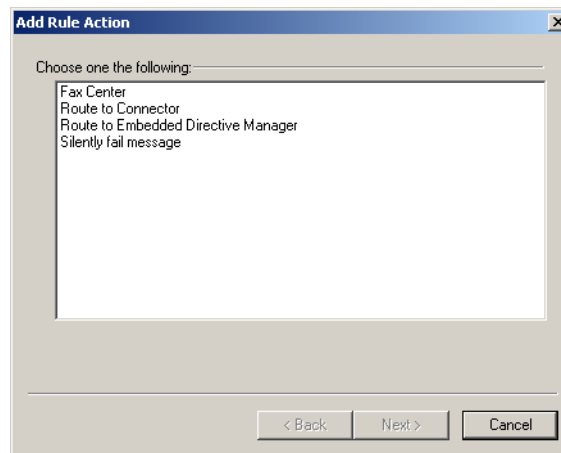
8. Select **Route to Connector** and click **Next**. The *Route to Connector* screen displays connector routing options.

9. Do all of the following:

    a. Select **Filescan on the Server** in the *Route to Connector* drop-down menu.

    b. Select **PDF (image)** in the *Document Delivery Format* drop-down menu,

    c. Select the **Destination** check box. Click the browse button, locate and select the folder you created for PDF output files, and click **OK**.
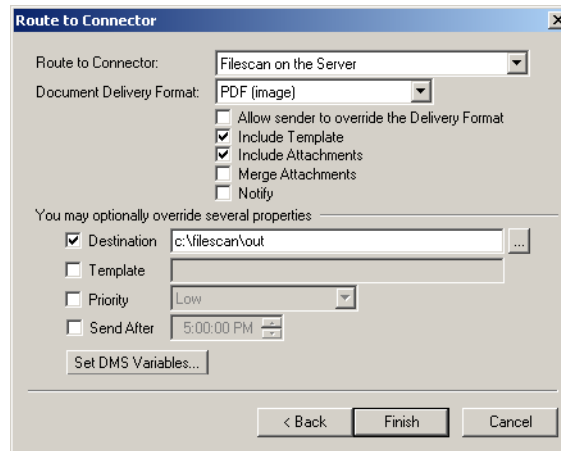
d. Click **Finish**. The *Create New Rule* screen displays the action you created.
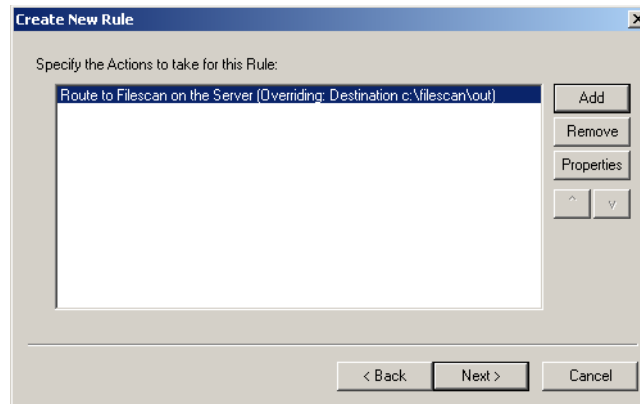
9. Click **Next**. The *Create New Rule* screen displays a list of actions that should be applied if the previous actions fail.
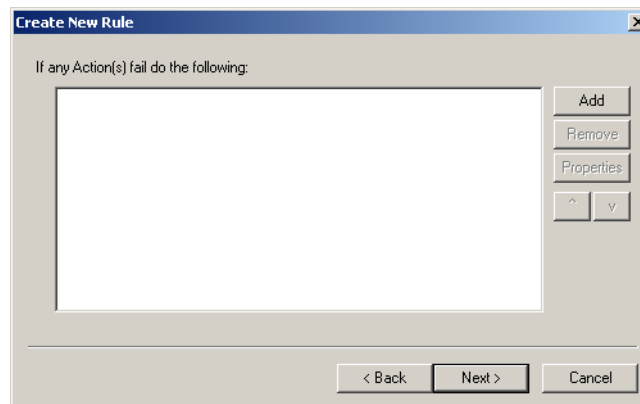
10. Click **Next**. The *Create New Rule* screen displays the friendly name of this rule.
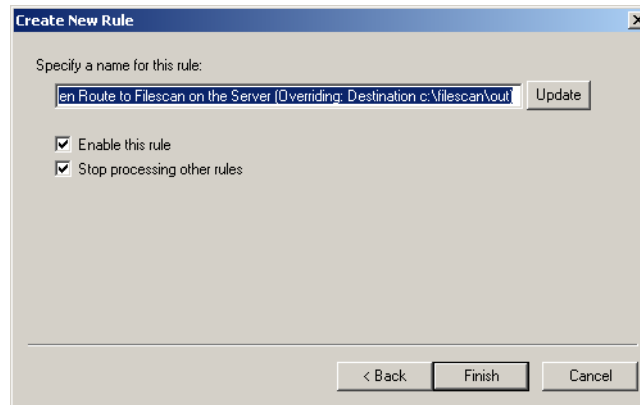
11. Change the name if desired, and click **Finish**. The rule appears in the *Outbound* details pane.

12. Move the rule to the top of the rules list.

You have created a rule that identifies outbound faxes with the fax destination 444, sets the output type to PDF, and routes them to the destination folder *c:\filescan\out*. Keep the Administrator running and proceed to the next section.

Sending the Quick Fax

Send a Quick Fax. Attach the bitmap in TIF format and send it to *444*, the destination you specified in the rule. Based on the rule, the server routes the Quick Fax to *c:\filescan\out*. The bitmap appears in c:\filescan\out as a PDF file.

To send a Quick Fax and convert a bitmap from TIF to PDF format:

1. Right-click **Messages** in the console tree, and select **New** > **Quick Fax**. The *Quick Fax* dialog box appears.

2. Do all of the following:

  a. Go to the *Recipient* section, and type 444 in the *Fax* text box.

  b. Go to the *Sender* section, and type a valid e-mail address in the *e-Mail* text box.
     (This e-mail address must be valid, because the server uses it to deliver notification messages. If the e-mail address is not valid, the Quick Fax fails.)

  c. Go to the *Attachments* section. Click **Add**, locate and select a TIF file, and click **Open**.

  d. Go to the *Options* section and clear the *Coverpage* text box.
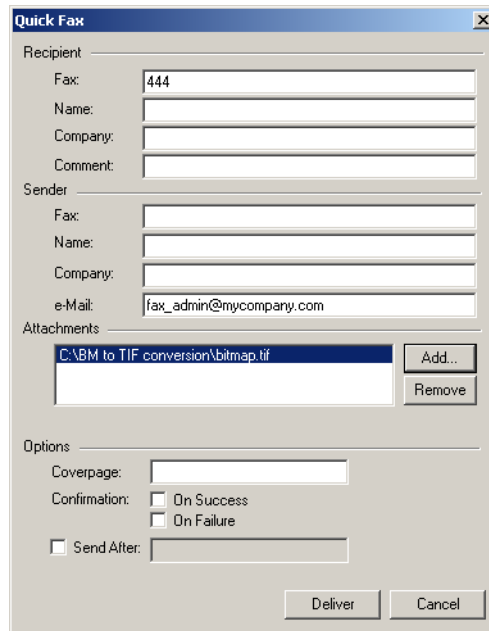
5. Click **Deliver**.

6. Use the Administrator to track the fax. Once it has been delivered, start Windows Explorer and browse to c:\filescan\out. Verify that the bitmap file appears in the directory as a PDF file.

Repeat this procedure for all bitmaps you need to convert from TIF to PDF format. The proceed to the next section.

Moving the PDF file to …\Omtool\OmtoolServer\forms

Instructions for a stand-alone server: Retrieve the PDF files from c:\filescan\out and move them to …\Omtool\OmtoolServer\forms. Then verify that control files with the #BITMAP keyword refer to the directory containing bitmaps.

Instructions for a server cluster: Retrieve the PDF files from c:\filescan\out and move the bitmaps to a location on the database server. Then modify the registry on both Genifax servers so that the Forms logical indicates the UNC path to the directory containing bitmaps.

To modify the Forms logical on the Genifax server:

1. Click **Start** and select **Run**.

2. Type `regedit` and click **OK**.

3. Navigate to My Computer\HKEY_LOCAL_MACHINE\SOFTWARE\Omtool\Genifax\Current Version\Logicals and double-click **FORMS** in the details pane.

4. Type the UNC path (\\computer\folder) to the directory containing bitmaps in the *Value data* field and click **OK**.

5. Close Registry Editor.

Be sure that you complete this procedure on both Genifax servers in the cluster.

Additionally, verify that control files with the #BITMAP keyword refer to the directory containing bitmaps.

CHAPTER 7: WORKING WITH FORM DEFINITION FILES

If you want to use form definition files with the Fax Sr. Filescan connector, complete all of the following sections:

      ☐ *Moving FRM files to the Genifax server* (p. 27)

      ☐ *Configuring the connector with the location of the directory containing FRM files* (p. 27)

      ☐ *Associating FRM files with filescan folders* (p. 28)

      ☐ *Reviewing the FRM files* (p. 29)

Moving FRM files to the Genifax server

Create a directory on the Genifax server for your form definition files, such as `c:\faxsrfilescan\forms`. Then copy all the form definition files from …\faxsr\form on the Fax Sr. server to the new directory on the Genifax server.[1]

> *Note:* **With Fax Sr., form definition files can be located in multiple folders, but with Genifax, all form definition files must be located in the same folder.**

Proceed to the next section and add the location of the form definition files to the connector configuration.

Configuring the connector with the location of the directory containing FRM files

To configure the Fax Sr. Filescan connector with the location of the directory containing FRM files:

1. Start the Administrator.

2. Expand *Omtool Server Administrator*, and then expand the server where you have added the Fax Sr. Filescan connector.

3. Click **Connectors** in the console tree and double-click the Fax Sr. Filescan connector in the details pane. The *Properties for Fax Sr. Filescan on the Server* dialog box appears.

4. Click the **Folders to scan** tab.

5. Locate the *Fax Sr. predefined form definition files can be found in:* text box and click the browse button. Browse to the folder where FRM files are located[2], select the folder, and click **OK**. The path to the folder appears in the text box.

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1. If you store the form definition files on a different system than the Genifax server, make sure the Genifax server account can access the folder and read the files. For more information on Windows sharing and security permissions, consult Windows help.
2. The folder where you moved the FRM files in the previous section.
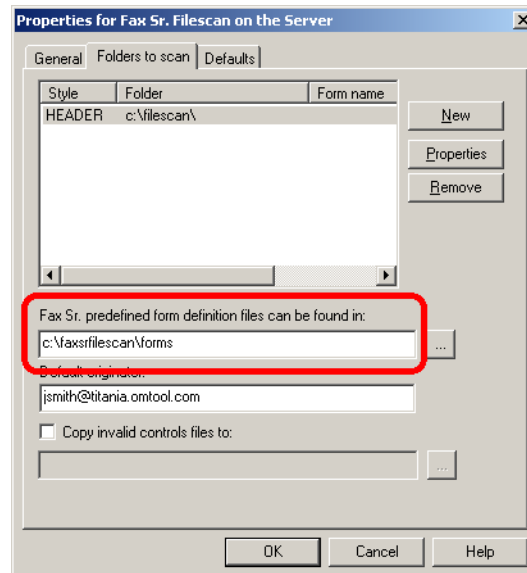
6. Click **OK** to save your changes to the connector.

Proceed to the next section and associate FRM files with filescan folders.

Associating FRM files with filescan folders

Once you have configured the connector with the location of the directory containing FRM files, you can associate an FRM file with a filescan folder. This enables the connector to apply the FRM file to all faxes that move through a filescan folder.

To associate an FRM file with a filescan folder:

1. Start the Administrator.

2. Expand *Omtool Server Administrator*, and then expand the server where you have added the Fax Sr. Filescan connector.

3. Click **Connectors** in the console tree and double-click the Fax Sr. Filescan connector in the details pane. The *Properties for Fax Sr. Filescan on the Server* dialog box appears.

4. Click the **Folders to scan** tab.

5. Select a filescan folder in the list and click **Properties**. The *Folder* dialog box appears.

6. Open the Form name menu and select the form you want to associate with this filescan folder.
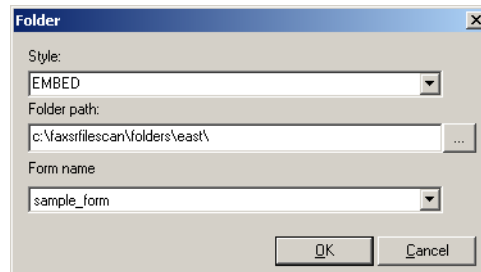
7. Click **OK** to close the *Folder* dialog box.

8. Click **OK** to save your changes to the connector.

Proceed to the next section and review the FRM files.

Reviewing the FRM files

Review the keywords in the form definition files and make sure that all the keywords are supported with the Fax Sr. Filescan connector. (See "Control file keywords" on page 35.)

CHAPTER 8: WORKING WITH FONTS

Using fonts with the Fax Sr. Filescan connector

Genifax utilizes the fonts in the Windows fonts directory[1] on the system where the Composer is located. This includes the special fonts installed with the Fax Sr. Filescan connector: 1, 11, 14, 40, 994, and 998.

When a control file includes the #FONT keyword, for example `#FONT 994`, the Genifax server uses the true type font in the Windows fonts directory, for example 994.TTF. When the specified font does not exist, the server uses the default font, *Arial*. For example, if the control file includes `#FON 50` and 50.TTF does not exist in the Windows fonts directory on the system where the Composer is located, the server uses the default font *Arial*.

> *Note:* **If you use any of the special fonts included with the Fax Sr. Filescan connector, you might notice slight differences[2] in font characteristics. For example, font number 14 might appear slightly smaller and slightly darker with Genifax than it did with Fax Sr.**

Replacing discontinued fonts

If you are using a special font that is not included with the Fax Sr. Filescan connector, choose another true type font in the Windows fonts directory. Make sure it exists in the Windows fonts directory on all systems where Composers are located, and then update your control files with the name of the font.

If you cannot modify your control files, contact Omtool Support to discuss possible workarounds. (See "Technical support" on page 3.)

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1. The default location of this directory is c:\WINDOWS\Fonts\ on Windows 2003 or c:\WINNT\Fonts\ on Windows 2000.
2. Fax Sr. and Genifax implement fonts very differently, so slight differences are possible.

CHAPTER 9: ADDITIONAL CONNECTOR CONFIGURATION

This section includes two optional configurations:

- *Configuring the connector to move invalid control files to another folder* (p. 31)
- *Setting defaults for the connector* (p. 32)

Configuring the connector to move invalid control files to another folder

The Fax Sr. Filescan connector has a special feature that enables it to process invalid control files efficiently.

When the connector encounters an invalid control file, it appends the file name with .BAD. For example, when the connector determines that `file.control` is an invalid control file, it renames the file `file.control.bad`.

Optionally, the connector can move the invalid control file to another folder. If you want the Fax Sr. Filescan connector to move invalid control files to a special folder, create the folder and then continue.

Note: **When you create a folder for invalid control files, make sure that the Genifax server account can access the folder and write files. For more information, consult** *Setting sharing and security permissions on filescan folders* **on page 42.**

To configure the Fax Sr. Filescan connector to move invalid control files to a special folder:

1. Start the Administrator.
2. Expand *Omtool Server Administrator*, and then expand the server where you have added the Fax Sr. Filescan connector.
3. Click **Connectors** in the console tree and double-click the Fax Sr. Filescan connector in the details pane. The *Properties for Fax Sr. Filescan on the Server* dialog box appears.
4. Click the **Folders to scan** tab.
5. Select the *Copy invalid control files to* option. Then click the browse button navigate to the folder where you want the connector to move invalid control files, select it, and click **OK**. The path to the folder appears in the text box.
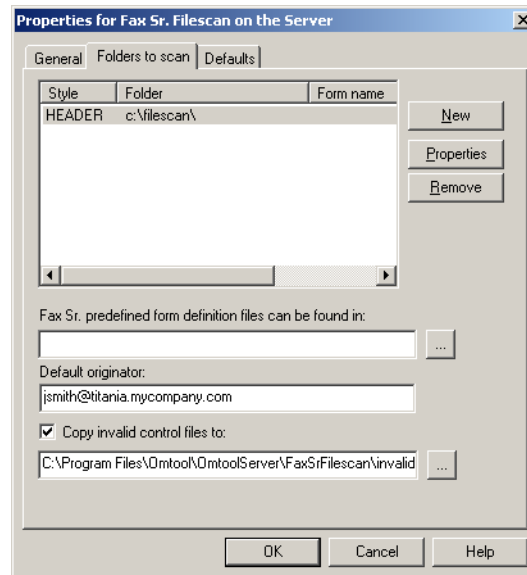
6. Click **OK** to save your changes to the connector.

Setting defaults for the connector

The Fax Sr. Filescan connector supports defaults. The connector adds a default option when a fax does not contain control data that overrides it. For example, suppose the connector defaults include `#COVER Invoice`. The connector analyzes the control data associated with a fax. If the control data does *not* include the #COVER keyword, the connector applies `#COVER Invoice` as specified in the connector defaults.

The control data associated with a fax always takes precedence over connector defaults. For example, if the control data associated with a fax includes `#COVER OmtoolCoverpage`, the connector does *not* apply the default option `#COVER Invoice`. The connector honors the control data associated with individual faxes.

Before you deploy the connector, Omtool recommends that you review the connector defaults and modify them if necessary.

> *Tip:* **Compare the connector defaults to the Fax Sr. server defaults. (The faxsr.default file on the Fax Sr. server contains the Fax Sr. server defaults. This file is located in …\FaxSr\.)**

To view and modify the connector defaults:

1. Start the Administrator.

2. Expand *Omtool Server Administrator*, and then expand the server where you have added the Fax Sr. Filescan connector.

3. Click **Connectors** in the console tree and double-click the Fax Sr. Filescan connector in the details pane. The *Properties for Fax Sr. Filescan on the Server* dialog box appears.

4. Click the **Defaults** tab.
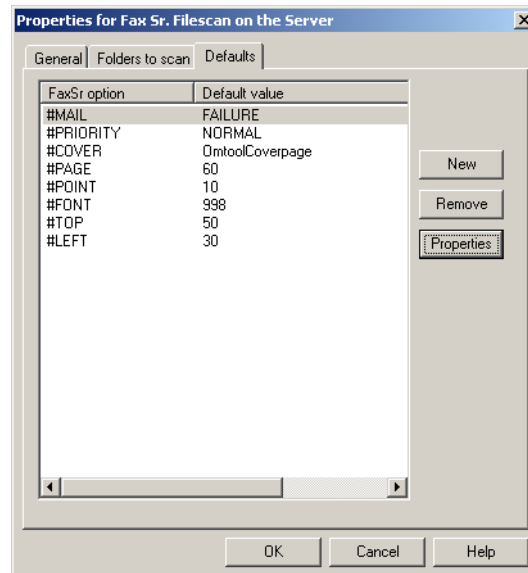
5. Review the default options. Add, remove, or modify options as necessary.

- **To modify an option**: Select the option you want to modify, and click **Properties**. Modify the default value in the *Value* text box and click **OK**. Verify that the defaults list displays the changes to the option.

- **To remove an option**: Select the option you want to remove, and click **Remove**. Click **Yes** on the confirmation dialog box. Verify that the option is removed from the defaults list.

Note: **The connector supports a given set of default keywords, and all supported default keywords are listed in the connector configuration. You may modify or remove them.**

6. Click **OK** to save your changes to the connector.

CHAPTER 10: DEPLOYING THE CONNECTOR

Testing the connector

Once you have set up the Fax Sr. Filescan connector and configured it, you should have two sets of filescan folders—the original filescan folders on the Fax Sr. server and the new filescan folders on the Genifax server. Before you consider deploying the connector in your production environment, test the connector configuration. Run a test fax through each filescan folder on the Genifax server. (Be sure to test every style of operation you use in your environment.) Verify that the Genifax server delivered the test faxes. Then open each fax and verify that the appearance is satisfactory.

During this testing phase, take note of the following:

- Do not configure the Fax Sr. Filescan connector on the Genifax server and the FileScan application service on the Fax Sr. server to poll the same filescan folder at the same time. This is not supported.

- Do not configure the Fax Sr. Filescan connector and the Filescan connector, both on the Genifax server, to poll the same filescan folder at the same time. This is not supported.

Choosing the filescan folders you want to use

When you are ready to start the Fax Sr. Filescan connector in your production environment, you must decide which set of filescan folders you want to use—the original filescan folders on the Fax Sr. server or the new filescan folders on the Genifax server.

- **Original filescan folders on the Fax Sr. server** — To deploy the connector with the original filescan folders on the Fax Sr. server, reconfigure the Fax Sr. Filescan connector on the Genifax server so that it monitors the filescan folders on the Fax Sr. server.

  Make sure that the Genifax server account can access each of the filescan folders. Each filescan folder must be shared to the Windows user account that runs the om* services on the Genifax server, and each filescan folder must grant the Windows user account security permissions with full control. (See *Setting sharing and security permissions on filescan folders* on page 42.)

- **New filescan folders on the Genifax server** — To deploy the connector with the new filescan folders on the Genifax server, configure your company's applications to save outbound faxes in the appropriate filescan folder on the Genifax server. Additionally, if any users are copying outbound faxes to filescan folders, notify them that the filescan folders have moved.

APPENDIX A: CONTROL FILE KEYWORDS

Supported Fax Sr. keywords

Table 1: Native Fax Sr. keywords supported with the Fax Sr. Filescan connector

Fax Sr. keyword (Supported abbreviation is shown in bold.)	Description, guidelines, and examples

#ADDRESS1
#ADDRESS2
#ADDRESS3
	Description: Indicates the sender's mailing address.
	Guidelines: Use #ADDRESS1 to represent the first line of the sender's mailing address, #ADDRESS2 to represent the second line, and #ADDRESS3 to represent the third. Only include #ADDRESS2 and #ADDRESS3 if necessary, Include the sender's entire mailing address on one line if desired.
	Example:
	`#ADDRESS1 Omtool, Ltd.`
	`#ADDRESS2 8 Industrial Way`
	`#ADDRESS3 Salem, NH 03079`

#AFTER	**Description:** Indicates the date and time when the server should attempt to send the fax. **Guidelines:** Specify the date and time using the supported format: `DD-MON-YEAR HH:MM:SS` **Example:** `#AFT 01-JAN-2005 14:55:00`
#ATCH	**Description:** Indicates the type of document attached to the outbound job. **Guidelines:** Use this keyword only with the EMBED style. Provides the extension for the embedded data. **Example:** `#ATCH filename.doc`
#BEGIN	**Description:** Marks the start location of control page keywords. **Guidelines:** This keyword is required in PostScript and PCL control page files. **Example:** `#BEGIN`

#BITMAP	**Description:** Indicates the bitmap file that should be used as the background for the cover page.
	Guidelines: Bitmap images must be converted to PDF format during the filescan migration from Fax Sr. to Genifax. (See "Working with bitmaps" on page 19.)
	Examples:
	`#BITMAP c:\faxsr\bitmap\logo.bm`
	`#BITMAP faxsr$bitmap:logo.bm`
	
	Note: **The Fax Sr. Filescan connector ignores predefined logicals that have meaning in Fax Sr. For example, if you use** `#BITMAP faxsr$bitmap:logo.bm`**, the Fax Sr. Filescan connector ignores** `faxsr$bitmap:` **and parses** `#BITMAP logo.bm`**.**

Table 1: Native Fax Sr. keywords supported with the Fax Sr. Filescan connector

Fax Sr. keyword (Supported abbreviation is shown in bold.)	Description, guidelines, and examples

#COMMENT1
#COMMENT2
#COMMENT3
#COMMENT4
#COMMENT5
#COMMENT6
#COMMENT7
#COMMENT8
#COMMENT9
#COMMENT10
#COMMENT11
#COMMENT12
	Description: Comments that should be included on the cover page.
	Guidelines: Use #COMMENT1 to indicate the first comment, #COMMENT2 to indicate the second comment, etc. Include up to 12 unique comments.
	Example:
	`#COMMENT1 <first comment>`
	`#COMMENT2 <second comment>`
	`#COMMENT3 <third comment>`

#COVER	**Description:** Indicates the complete path to the cover page template. (The Genifax server uses the cover page template to compose the cover page that should be included with the outbound fax.)
	Compatibility: Works with AccuRoute and Genifax servers, and can be used with Fax Sr. Filescan, Filescan, and SMTP connectors.
	Value: The file name of the cover page template.
	Guidelines: Cover pages must be compatible with Genifax. (See "Working with cover pages" on page 17.)
	Examples:
	`#COVER \faxsr\cover\smith.cvr`
	`#COVER faxsr$cover:smith.cvr`
	
	Note: The Fax Sr. Filescan connector ignores predefined logicals that have meaning in Fax Sr. For example, if you use `#COVER faxsr$cover:salescoverpage.cvr`*, the Fax Sr. Filescan connector ignores* `faxsr$cover:` *and parses* `#COVER salescoverpage.cvr`*.*
	
	Note: The cover page template must be located on the Genifax server in ...\Omtool\OmtoolServer\Languages\ENU\Templates\.

#END	**Description:** Marks the end location of control page keywords. **Guidelines:** This keyword is required in PostScript and PCL control page files. **Example:** `#END`
#FAX	**Description:** Indicates the destination fax number. (Same as #PHONE.) **Guidelines:** Include the fax number of the recipient. Keep in mind that the modem server normalizes the destination fax number, so you are not required to include the area code for local calls, or to include a 1 for long distance calls in the United States. **Example:** `#FAX 1-123-456-7890`

Table 1: Native Fax Sr. keywords supported with the Fax Sr. Filescan connector

Fax Sr. keyword (Supported abbreviation is shown in bold.)	Description, guidelines, and examples
#FONT	**Description:** Font that should be used in the fax. **Value:** The name of a true type font that exists in the Windows fonts directory on the system where the composer is running. (When a font does not exist in the Windows fonts directory, the server uses the default font *Arial*.) **Guidelines:** This keyword applies only to text files. **Example:** #FONT 998 or #FONT Arial *Tip:* **For more information on using fonts with the Fax Sr. Filescan connector, see** *Working with fonts* **on page 30.**
#FORM	**Description:** Indicates the complete path to the form definition file. **Guidelines:** Do *not* include the FRM file extension. **Example:** #FORM c:\faxsr\form\abcform or #FORM faxsr$form:abcform *Note:* **The Fax Sr. Filescan connector ignores predefined logicals that have meaning in Fax Sr. For example, if you use** #FORM faxsr$form:abcform**, the Fax Sr. Filescan connector ignores** axsr$form: **and parses** #FORM abcform**.** *Note:* **The Fax Sr. Filescan connector must be able to access the FRM file. Make sure that the Genifax server account can access the folder where the file is located. (Share the folder and give the Genifax server account full control, and also give the Genifax server account security permissions with full control. For more information on sharing and security in Windows, consult** *Setting sharing and security permissions on filescan folders* **on page 42.)**
#LANDSCAPE	**Description:** Indicates the page orientation of the fax. **Guidelines:** This keyword applies only to text files. When you use this keyword to control the page orientation, you should also use the #PAG setting to set the desired number of lines that should be used with the selected page orientation. The default value for #PAG is 60 lines for portrait and 48 lines for landscape. These values can change, depending on the font, point size, and lines per inch you specify. Note that when you include #LAN YES in the control page but do not adjust the #PAG setting accordingly, the fax includes extra page, most of them blank. **Example:** #LAN YES
#LEFT	**Description:** Specifies the left-side margin. **Guidelines:** This keyword applies only to text files. Specify the margin in columns (200 columns = 1 inch). **Example:** #LEF 100
#LPI	**Description:** Indicates lines per inch for the fax. **Guidelines:** This keyword applies only to text files. **Example:** #LPI 3
#MAIL	**Description:** Indicates the e-mail notification setting for an outbound fax. **Guidelines:** Use one of the following e-mail notification types: **Mail on success and failure**, **Do not mail**, **Mail on success**, **Mail on failure**, **Mail on success with file**, or **Mail on failure with file**. Note that the connector uses the sender's e-mail address as specified by #USER (Fax Sr. keyword) or #SENDER_EMAIL (Genifax keyword). **Example:** #MAIL Mail on failure

Table 1: Native Fax Sr. keywords supported with the Fax Sr. Filescan connector

Fax Sr. keyword (Supported abbreviation is shown in bold.)	Description, guidelines, and examples
#NEXT	**Description:** Separates faxes when used with the MULTIPLE style of operation. Separates distribution list recipients when used with the HEADER style of operation. **Example:** #NEXT
#PAGE	**Description:** Indicates the number of text lines per page. **Guidelines:** This keyword applies only to text files. Use this keyword in conjunction with #LANDSCAPE. **Example:** #PAG 60
#PAPER	**Description:** Indicates the length of the paper. **Guidelines:** Use LETTER, LEGAL, or a custom number of inches. **Example:** #PAPER 10
#PHONE	**Description:** Indicates the destination fax number. (Same as #FAX.) **Guidelines:** Include the fax number of the recipient. Keep in mind that the modem server normalizes the destination fax number, so you are not required to include the area code for local calls, or to include a 1 for long distance calls in the United States. **Example:** #PHO 1-123-456-7890
#POINT	**Description:** Indicates the point size of the text. **Guidelines:** This keyword applies only to text files. **Example:** #POINT 10
#RECIP_NAME	**Description:** Indicates the name of the recipient. **Guidelines:** Include the recipient's name as you want it to appear on the cover page. Note that the cover page can display the recipient name only if it has been configured to do so. **Example:** #RECIP_NAME John Smith
#REFERENCE	**Description:** Indicates the reference string for the fax. **Guidelines:** Use FAX if you want the reference string to be the same as the fax number. Note that the reference string is limited to 30 characters; any additional characters are truncated. **Example:** #REF FAX or #REF MyFax1234
#SENDER	**Description:** Indicates the name of the sender. **Guidelines:** Include the sender's name as you want it to appear on the cover page. Note that the cover page can display the sender name only if it has been configured to do so. **Example:** #SEN John Smith
#TEXT	**Description:** Marks the end of control data and the beginning of body text. **Example:** #TEXT
#TOP	**Description:** Indicates the top margin of the fax. **Guidelines:** This keyword applies only to text files. Specify the margin in scan lines (200 lines = 1 inch fine mode). **Example:** #TOP 50
#USER	**Description:** Indicates the e-mail address of the sender. **Guidelines:** The server uses this e-mail address for notification messages. **Example:** #USE jsmith@company.com

Genifax keywords

Table 2: Genifax keywords supported with the Fax Sr. Filescan connector

Genifax keyword (Abbreviations are not supported.)	Description, guidelines, and example
#ACCESS_CODE	**Description:** Indicates the sender's personal access code. **Compatibility:** Works with AccuRoute and Genifax servers, and can be used with Fax Sr. Filescan, Filescan, and SMTP connectors. **Value:** numeric string **Guidelines:** The value for this keyword should match the value in a dialing rule on the server. If it does not, the server processes the fax, but the telephone system your company uses might prevent delivery. **Example:** #ACCESS_CODE 1234
#ATTACHMENT	**Description:** Indicates the files that should be sent as part of the document or fax. **Compatibility:** Works with AccuRoute and Genifax servers, and can be used with Filescan connectors. **Value:** The file name of a document if the document is copied to the Filescan folder with the control file. Note that the Filescan connector removes the file from the Filescan folder. Or the path to a document if the document is not copied to the Filescan folder. The path to the document must be a fully qualified file path, such as \\computer\folder\filename. **Guidelines:** This keyword is required if you are sending a document or fax via a Genifax server. You can select any file in a supported file format. **Example:** #ATTACHMENT \\computer\folder\filename *Note:* **The Fax Sr. Filescan connector must be able to access the attachment. Make sure that the Genifax server account can access the folder where the file is located. (Share the folder and give the Genifax server account full control, and also give the Genifax server account security permissions with full control. For more information on sharing and security in Windows, consult** *Setting sharing and security permissions on filescan folders* **on page 42.)**
#BILLING_CODE	**Description:** Indicates the billing code associated with a document or fax. **Compatibility:** Works with AccuRoute and Genifax servers, and can be used with Fax Sr. Filescan, Filescan, and SMTP connectors. **Value:** Billing code **Example:** #BILLING_CODE 55512347

Table 2: Genifax keywords supported with the Fax Sr. Filescan connector

Genifax keyword (Abbreviations are not supported.)	Description, guidelines, and example

#COVER	**Description:** Indicates the complete path to the cover page template. (The Genifax server uses the cover page template to compose the cover page that should be included with the outbound fax.)
	Compatibility: Works with AccuRoute and Genifax servers, and can be used with Fax Sr. Filescan, Filescan, and SMTP connectors.
	Value: The file name of the cover page template.
	Guidelines: Cover pages must be compatible with Genifax. (See "Working with cover pages" on page 17.)
	Examples:
	`#COVER \faxsr\cover\smith.cvr`
	`#COVER faxsr$cover:smith.cvr`
	
	Note: The Fax Sr. Filescan connector ignores predefined logicals that had meaning in Fax Sr. For example, if you use `#COVER faxsr$cover:salescoverpage.cvr`*, the Fax Sr. Filescan connector ignores* `faxsr$cover:` *and parses* `#COVER salescoverpage.cvr`*.*
	
	Note: The cover page template must be location on the Genifax server in …\Omtool\OmtoolServer\Languages\ENU\Templates\.

#PRIORITY	**Description:** Indicates the priority associated with a document or fax. **Compatibility:** Works with AccuRoute and Genifax servers, and can be used with Fax Sr. Filescan, Filescan, and SMTP connectors. **Value:** `HIGH`, `NORMAL`, or `LOW` **Guidelines:** When the control file does not include this keyword, the document or fax is delivered with normal priority. **Example:** `#PRIORITY LOW`

Discontinued keywords

Table 3: Fax Sr. keywords not supported with the Fax Sr. Filescan connector

Discontinued keyword	Additional information
#ATTEMPT	Connector ignores this keyword; it is not supported. Retry attempts are managed in the Telco connector.
#BOTTOM	Connector ignores this keyword; it is not supported.
#COMMAND	Connector ignores this keyword; it is not supported.
#COMPOSITION	Connector ignores this keyword; it is not supported. All documents are converted to PDF. You can configure the server rules so that the server generates additional composition types.
#FF	Connector ignores this keyword; it is not supported. Server recognizes and honors page breaks.

Table 3: Fax Sr. keywords not supported with the Fax Sr. Filescan connector

Discontinued keyword	Additional information
#FINE	Connector ignores this keyword; it is not supported. Genifax conversions always creates fine mode TIFF files.
#INTERVAL	Connector ignores this keyword; it is not supported. Retry intervals are managed in the Telco connector.
#MULTINATIONAL	Connector ignores this keyword; it is not supported. The Compose component on the Genifax server recognizes characters in the extended ASCII range.
#ORIGINAL	Connector ignores this keyword; it is not supported.
#REJECT	Connector ignores this keyword; it is not supported.
#RETAIN	Connector ignores this keyword; it is not supported. Genifax retains faxes in the History.
#SERVER	Connector ignores this keyword; it is not supported.

APPENDIX B: SETTING SHARING AND SECURITY PERMISSIONS ON FILESCAN FOLDERS

You must configure the sharing and security permissions on all filescan folders so that the Genifax server account can access each folder with full control. Filescan folders include all folders that the Fax Sr. Filescan connector uses to process faxes, and includes:

- filescan folders where the connector retrieves outbound faxes
- folders containing bitmaps
- folder containing form definition files
- folder where the connector moves invalid control files

Proceed to the next section and share your filescan folders with the Genifax server account.
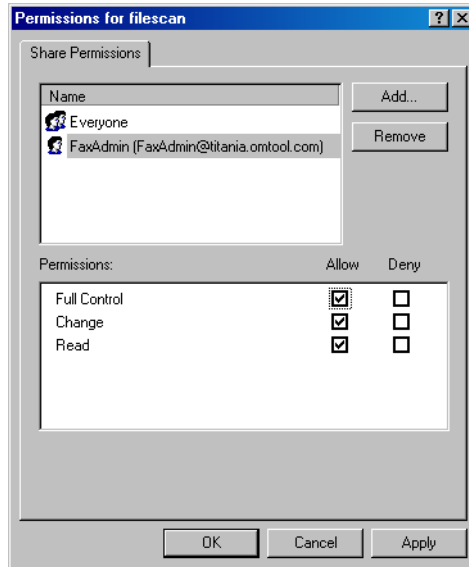
Sharing a filescan folder

You must share all filescan folders to the Genifax server account.

To share a filescan folder to the Genifax server account:

1. Log on to the Fax Sr. server using an account that belongs to the Administrators group on the server.
2. Start Windows Explorer and navigate to the filescan folder.
3. Right-click the filescan folder and select **Properties**.
4. Click the **Sharing** tab.
5. Select the *Share the folder* option and click the **Permissions** button. The *Permissions for <folder name>* dialog box appears.

6. Add the Genifax server account to the list and grant this account full control.

7. Click **Apply** and click **OK**.

Repeat this procedure on all filescan folders. Then proceed to the next section and set the security permissions on them.

Setting security permissions on a filescan folder

The Genifax server account must have full security permissions

To set the security permissions on a filescan folder:

1. Log on to the Fax Sr. server using an account that belongs to the Administrators group on the server.

2. Start Windows Explorer and navigate to the filescan folder.

3. Right-click the filescan folder and select **Properties**.

4. Click the **Security** tab.

5. Add the Genifax server account to the list and grant this account full control.
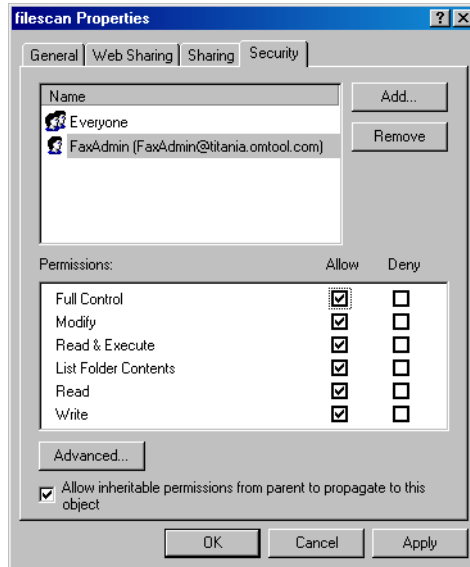
6. Click **Apply** and click **OK**.

Repeat this procedure on all filescan folders.

GLOSSARY

AccuRoute

An Omtool server application that provides inbound and outbound document routing to numerous destination types. An enterprise application, it features centralized management to network administrators, an audit trail, and automated server maintenance features. Connectors allow this server application to collect inbound and outbound documents, and interface with third-party applications and systems. Client software enables users to benefit from the AccuRoute feature set in a variety of business applications.

e-mail notification

An e-mail message from the Omtool server that contains status information about document delivery.

Fax Sr.

An Omtool fax server application that features centralized management to network administrators, an audit trail, and automated server maintenance features. Client software enables users to benefit from the Fax Sr. feature set in a variety of business applications.

Fax Sr. Filescan

A connector or service associated with your Omtool server application. It routinely monitors a shared directory and immediately collects all files detected. As soon as Filescan collects the files, your Omtool server begins processing them. (This connector is a special filescan connector designed to process faxes that were formerly processed by a Fax Sr. server.)

Filescan

A connector or service associated with your Omtool server application. It routinely monitors a shared directory and immediately collects all files detected. As soon as Filescan collects the files, your Omtool server begins processing them.

filescan folder

A folder, or Windows directory, associated the Fax Sr. Filescan connector.

Genifax

An Omtool fax server application that provides inbound and outbound document routing to numerous destination types. An enterprise application, it features centralized management to network administrators, an audit trail, and automated server maintenance features. Connectors allow this server application to collect inbound and outbound documents, and interface with third-party applications and systems. Client software enables users to benefit from the unique Genifax feature set in a variety of business applications.

Genifax server account

The Windows user account that runs the om* services on the Genifax server.

originator

> The e-mail address of the sender. Your Omtool server application uses the e-mail address for e-mail notification messages.

rule

> Consists of a condition, an action, and a failover action. When a document arrives on your Omtool server, the server tests the document against a set of rules. If the document meets all the conditions associated with any rule, the server applies the actions to the document. If the actions fail, the server applies failover actions to the document.

secure fax delivery

> A secure method of sending faxes. It ensures that only the recipient can view the fax during the transmission and that the enclosed information remains confidential.