

Installation guide

For AccuRoute v2.0.1 and Genifax v3.3.1

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Chapter 1: Introduction

In this chapter...

- "About this guide" on page 2
- "Intended audience" on page 3
- "Additional resources" on page 4

About this guide

This guide helps you install and configure your AccuRoute or Genifax server.

By following the procedures in this guide, you will:

- Complete all pre-installation steps for an AccuRoute or Genifax server, including selecting user accounts for the installation, installing IIS, creating a scan repository for the XeroxScan connector (if applicable), installing a fax board and drivers (if applicable), and installing the Web Client (if applicable).
- Install software on the server and other computers that function as remote Administrators, remote Composers, and remote Modem Servers.
- Perform additional configuration on the AccuRoute or Genifax server if necessary.
- Install client applications such the AccuRoute Client, CostRecovery, FaxCenter, and the Genifax Desktop.

Omtool recommends that you browse this guide, develop an understanding of the installation process, and then plan your installation accordingly.

Note: If you have any questions about the installation process or require assistance during the installation procedure, contact Omtool Technical Support. (See "Customer service and technical support" on page 4.) Send comments on this documentation to documentation@omtool.com.

Some servers require additional configuration. You can find more information on configuring your server in the Administrator help:

<http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm>

Intended audience

This guide contains instructions on installing software applications and fax boards on computers in a local area network. It is written for an advanced computer user or network administrator with a general understanding of the following concepts: networking principles including network security as they apply to a Windows environment, basic functions of the Windows Server operating system, telephony and the telephone system in the target environment (for servers with faxing capability), Internet Information Services, Windows command prompt, Windows plug and play drivers, and network printers.

In order to complete the procedures described herein, you should have the ability and appropriate permissions to do the following: install a fax board into a PCI slot on the server with a limited set of instructions (for servers with faxing capability), create users and assign permissions, map drives, share directories and configure access security, add Windows components to the operating system using the Add/Remove Programs applet in the Control Panel, install software locally and remotely, and place calls on the telephone system in the target environment (for servers with faxing capability).



Additional resources

Omtool Knowledge Base

Go to the Omtool Knowledge Base for 24-hour access to online documentation, software updates and other downloads, and detailed technical information that can help you troubleshoot issues.

To access the Knowledge Base, go to <http://www.omtool.com/support>, and log in using your customer number. Click **KNOWLEDGE BASE** to access technical articles, or **DOWNLOADS & DOCS** to access online documentation, software updates, and downloads.

Tip: You can find a complete listing of documentation for AccuRoute and Genifax in the \Documentation directory on the installation CD.

Customer service and technical support

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

Outside the United States: (978) 327-5700

Fax: (978) 659-1300

E-mail: customerservice@omtool.com or support@omtool.com

Sales and licensing

Omtool Sales representatives can provide you with more information about Omtool products or add-ins for existing products, and can assist you in purchasing licenses. Contact Omtool Sales at (800) 886-7845 in the United States or (978) 327-5700 outside the United States.

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Omtool consultants can help you customize Omtool applications for your company. For more information about Omtool consulting services, contact Omtool Sales at (800) 886-7845 in the United States or (978) 327-5700 outside the United States.

Chapter 2: Requirements

In this chapter...

- "AccuRoute and Genifax servers" on page 8
- "Remote Administrators" on page 10
- "Remote Composers" on page 11
- "Remote Modem Servers (for servers with faxing capability)" on page 12

AccuRoute and Genifax servers

The AccuRoute or Genifax server must belong to a domain in the local area network and meet the following requirements:

- Pentium® 3 server-class processor, 1GHz or faster
- 20 GB hard disk space
- 512 MB RAM
- Unoccupied PCI slot that can accommodate a full-length card (for servers with faxing capability)
- Windows 2003 Server Standard Edition, Windows® 2000 Server with SP4, or Windows® 2000 Advanced Server with SP4*
- Internet Explorer 6.0*
- Microsoft Word 2003/2002/2000* required on AccuRoute servers; *Microsoft Office 2003/2002/2000* recommended on all servers¹
- Internet Information Services 5.0* or later (for servers with the Web Client, an SMTP connector, or the XeroxScan connector)
- Exchange 2003/2000 System Manager* or *Exchange 5.5 Administrator* (for servers with an Exchange connector)
- Notes 6.0/5.x client* (for servers with a Notes connector)
- Adobe® Acrobat Reader® 5.0* or later recommended²

Important! Do not run any other enterprise applications on the AccuRoute or Genifax server.

(continued on next page)

-
1. When Microsoft Office is installed on the server, you can configure the Compose component to use Automation when it converts Word, Excel, and PowerPoint files. (Automation is a file conversion method that utilizes a document's native application, ensuring the highest possible quality for document conversion.)
 2. Some product documentation such as the installation guide and the release notes are in PDF format.

The installation requires:

- Windows installation CD
- AccuRoute or Genifax installation CD
- One or more of the following supported fax board models (for servers that support faxing):
 - Brooktrout Technology TRI034™ series
 - Brooktrout Technology TRI14™ series (PCI or uPCI)
 - Brooktrout Technology TruFax® series
- Grounding device for fax board installation (if applicable)

Remote Administrators

The computer must belong to the same domain as the AccuRoute or Genifax server or to a domain that has a bidirectional trust with the server's domain, and meet the following requirements:

- Pentium® 3 processor, 1GHz or faster
- 512 MB RAM
- 20 GB hard disk space
- Windows® 2003 Server Standard Edition, Windows® XP Professional, Windows® 2000 Server with SP4, Windows® 2000 Advanced Server with SP4, or Windows® 2000 Professional with SP3
- Internet Explorer 6.0
- Adobe® Acrobat Reader® 5.0 or later recommended³

The installation requires:

- AccuRoute or Genifax installation CD

3. Some product documentation such as the installation guide and the release notes are in PDF format.

Remote Composers

The computer must belong to the same domain as the AccuRoute or Genifax server and meet the following requirements:

- Pentium® 3 processor, 1GHz or faster
- 512 MB RAM
- 20 GB hard disk space
- Windows® 2000 Server with SP4, Windows® 2000 Advanced Server with SP4, or Windows 2003 Server Standard Edition*
- Microsoft Word 2003/2002/2000* required on AccuRoute servers; *Microsoft Office 2003/2002/2000* recommended on all servers⁴

The installation requires:

- AccuRoute or Genifax installation CD

4. When Microsoft Office is installed on the server, you can configure the Compose component to use Automation when it converts Word, Excel, and PowerPoint files. (Automation is a file conversion method that utilizes a document's native application, ensuring the highest possible quality for document conversion.)

Remote Modem Servers (for servers with faxing capability)

The computer must belong to the same domain as the AccuRoute or Genifax server and meet the following requirements:

- Pentium® 3 processor, 1GHz or faster
- 512 MB RAM for T1 line (2 to 24 channels), 1 GB RAM for two T1 lines (more than 24 channels)
- 20 GB hard disk space
- Unoccupied PCI slot that can accommodate a full-length card
- Windows® 2000 Server with SP4, Windows® 2000 Advanced Server with SP4, or Windows 2003 Server Standard Edition*

The installation requires:

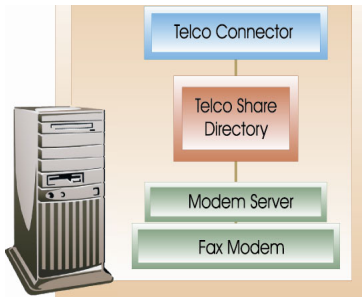
- Windows installation CD
- AccuRoute or Genifax installation CD
- One or more of the following supported fax board models:
 - Brooktrout Technology TR1034™ series
 - Brooktrout Technology TR114™ series (PCI or uPCI)
 - Brooktrout Technology TruFax® series
- Grounding device for fax board installation

Supported Modem Server configurations

The server supports several Modem Server configurations for Telco connectors. These configurations include environments with local and remote Modem Servers, single and multiple fax boards, and single and multiple telco share directories⁵.

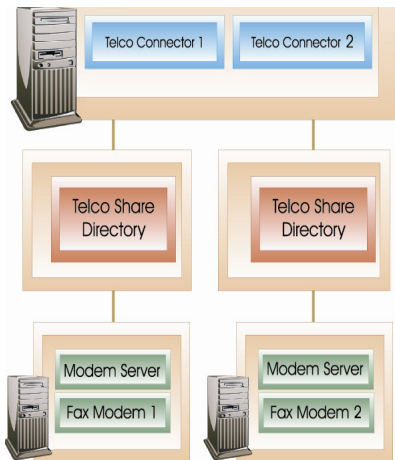
Telco connector and local Modem Server (default configuration)

- **AccuRoute or Genifax Server** has a Telco connector, Modem Server software, and fax board.



Multiple Telco connectors and remote Modem Servers

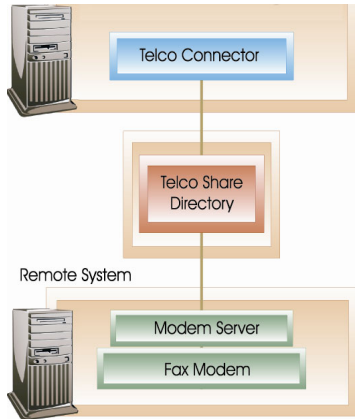
- **AccuRoute or Genifax Server** has a Telco connector that manages Modem Server 1 and a Telco connector that manages Modem Server 2.
- **Modem Server 1** has Modem Server software and a fax board.
- **Modem Server 2** has Modem Server software and a fax board.



-
5. The Telco connector and the Modem Server routinely monitor the telco share directory for inbound and outbound faxes. For an inbound fax, the Modem Server receives the fax and copies it to the telco share directory, and the Telco connector detects and collects the fax. For an outbound fax, the server finishes preparing the fax for delivery, the Telco connector copies the fax to the telco share directory, and the Modem Server delivers the fax via a fax board.

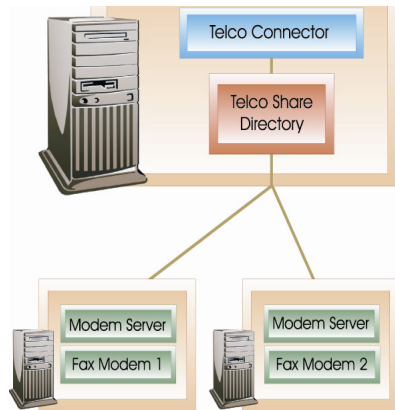
Telco connector and remote Modem Server

- **AccuRoute or Genifax Server** has a Telco connector that manages the Modem Server.
- **Modem Server** has Modem Server software and a fax board.



Telco connector and multiple remote Modem Servers

- **AccuRoute or Genifax Server** has a Telco connector that manages Modem Servers 1 and 2.
- **Modem Server 1** has Modem Server software and a fax board.
- **Modem Server 2** has Modem Server software and a fax board.



Chapter 3: Preparing for the installation

In this chapter...

- "Selecting user accounts for the installation" on page 16
- "Installing IIS" on page 26
- "Creating a scan repository for the XeroxScan connector" on page 28
- "Installing fax boards, Windows drivers, and Omtool firmware" on page 32
- "Installing the Web Client (for servers with faxing capability only)" on page 42

Selecting user accounts for the installation

Selecting a server account and assigning required permissions

Select a Windows user account for the AccuRoute or Genifax server. This account must:

- be a local administrator and belong to the Administrators group
- be a domain user and belong to the Domain Users group
- have a password that never expires

This account has two purposes. You use this account to log on to the server when you install the server software, and the AccuRoute or Genifax server uses this account to run Windows services.

Tip: For instructions on creating a user account, see "Creating Windows user accounts" on page 23.

Once you have selected a server account, continue to the next section.

Assigning Distributed COM permissions

Before you install any server-side application, you must assign Distributed COM permissions to the server account, the SYSTEM account, and the INTERACTIVE account.

Important! You complete this step on all systems where you plan to install a server-side application for AccuRoute or Genifax. Server-side applications include the AccuRoute or Genifax server software, as well as remote Administrators, Composers, and Modem Servers.

Follow the instructions for your server operating system. (See "Windows 2003 and Windows XP" on page 17 or "Windows 2000" on page 18.)

Windows 2003 and Windows XP

Note: Configure Distributed COM permissions on Windows XP for remote Administrators only. No other server-side applications for AccuRoute or Genifax support Windows XP. (All server-side applications support Windows 2003.)

To assign Distributed COM permissions on Windows 2003 or Windows XP:

1. Click the **Start** button and select **Run**. Type `dcomcnfg` in the *Open* text box and click **OK**. The *Component Services* snap-in appears.
2. Expand *Component Services > Computers*. Right-click **My Computer** and select **Properties**.
3. Click the **Default COM Security** tab.
4. Assign access permissions to the server account, the SYSTEM account, and the INTERACTIVE account:
 - a. Click **Edit Default** in the *Access Permissions* section. The *Access Permission* dialog box appears.
 - b. Click **Add**, type the user name of the server account in the text box, click **Check Names** to resolve the account name, and click **OK** to add the user.
 - c. Go to the *Group or user names* section and select the server account. Then go to the *Permissions for <server account>* section, locate *Access Permission* in the list and verify that the *Allow* option is selected.
 - d. Go to the *Group or user names* section and select **SYSTEM**. Then go to the *Permissions for SYSTEM* section, locate *Access Permission* in the list and verify that the *Allow* option is selected.
 - e. Click **Add**, type `interactive`, click **Check Names** to resolve the account name, and click **OK** to add the user.
 - f. Go to the *Group or user names* section and select **INTERACTIVE**. Then go to the *Permissions for INTERACTIVE* section, locate *Access Permission* in the list and verify that the *Allow* option is selected.
 - g. Click **OK** to close the *Access Permission* dialog box.

5. Assign launch permissions to the server account, the SYSTEM account, and the INTERACTIVE account:
 - a. Click **Edit Default** in the *Launch Permissions* section. The *Launch Permission* dialog box appears.
 - b. Go to the *Group or user names* section and select the server account. Then go to the *Permissions for <server account>* section, locate *Launch Permission* in the list and verify that the *Allow* option is selected.
 - c. Go to the *Group or user names* section and select **SYSTEM**. Then go to the *Permissions for SYSTEM* section, locate *Launch Permission* in the list and verify that the *Allow* option is selected.
 - d. Go to the *Group or user names* section and select **INTERACTIVE**. Then go to the *Permissions for INTERACTIVE* section, locate *Launch Permission* in the list and verify that the *Allow* option is selected.
 - e. Click **OK** to close the *Launch Permission* dialog box.
6. Click **OK** to save your changes and close the *My Computer Properties* dialog box.

Windows 2000

To assign Distributed COM permissions on Windows 2000:

1. Click the **Start** button and select **Run**. Type `dcomcnfg` in the *Open* text box and click **OK**. The *Distributed COM Configuration Properties* dialog box appears.
2. Click the **Default Security** tab.
3. Assign default access permissions to the server account, the SYSTEM account, and the INTERACTIVE account:
 - a. Click **Edit Default** in the *Default Access Permissions* section. The *Registry Value Permissions* dialog box appears.
 - b. Click **Add**. The *Add Users and Groups* dialog box appears.
 - c. Select the server account, verify that the **Allow Access** option is selected in the *Type of Access* menu, and click **Add**.
 - d. Select **SYSTEM**, verify that the **Allow Access** option is selected in the *Type of Access* menu, and click **Add**.
 - e. Select **INTERACTIVE**, verify that the **Allow Access** option is selected in the *Type of Access* menu, and click **Add**.

- f. Click **OK** to close the *Add Users and Groups* dialog box.
 - g. Click **OK** to close the *Registry Value Permissions* dialog box.
4. Assign default launch permissions to the server account, the SYSTEM account, and the INTERACTIVE account:
- a. Click **Edit Default** in the *Default Launch Permissions* section. The *Registry Value Permissions* dialog box appears.
 - b. Click **Add**. The *Add Users and Groups* dialog box appears.
 - c. Select the server account, verify that the **Allow Launch** option is selected in the *Type of Access* menu, and click **Add**.
 - d. Select **SYSTEM**, verify that the **Allow Launch** option is selected in the *Type of Access* menu, and click **Add**.
 - e. Select **INTERACTIVE**, verify that the **Allow Launch** option is selected in the *Type of Access* menu, and click **Add**.
 - f. Click **OK** to close the *Add Users and Groups* dialog box.
 - g. Click **OK** to close the *Registry Value Permissions* dialog box.
5. Assign default configuration permissions to the server account, the SYSTEM account, and the INTERACTIVE account:
- a. Click **Edit Default** in the *Default Configuration Permissions* section. The *Registry Value Permissions* dialog box appears.
 - b. Click **Add**. The *Add Users and Groups* dialog box appears.
 - c. Select the server account, verify that the **Full Control** option is selected in the *Type of Access* menu, and click **Add**.
 - d. Select **SYSTEM**, verify that the **Full Control** option is selected in the *Type of Access* menu, and click **Add**.
 - e. Select **INTERACTIVE**, verify that the **Full Control** option is selected in the *Type of Access* menu, and click **Add**.
 - f. Click **OK** to close the *Add Users and Groups* dialog box.
 - g. Click **OK** to close the *Registry Value Permissions* dialog box.
6. Click **OK** to save your changes and close the *Distributed COM Configuration Properties* dialog box.



Giving the server account permissions to access the Exchange 2003/2000 Server mailbox store (for servers with an Exchange connector)

Note: Complete this procedure if your AccuRoute or Genifax server has an Exchange connector and your company has an Exchange 2003/2000 mail server.

To give the server account permissions to access the Exchange 2003/2000 Server mailbox store:

1. Start the Exchange System Manager.
2. Expand *Administrative Groups > First Administrative Groups > Servers* in the console tree.
3. Expand the *computer name* of the server where you will install the server software, and then expand *First Storage Group*.
4. Right-click on **Mailbox Store** and select **Properties**.
5. Click the **Security** tab.
6. Add the server account to the Mailbox Store Properties and allow this account full control, including *Send As* and *Receive As* permissions.
7. Click **OK** to save your changes to the Mailbox Store.

Giving the server account Service Account Admin permissions to Exchange 5.5 Server organizations, sites, and configurations (for servers with an Exchange connector)

Note: Complete this procedure if your AccuRoute or Genifax server has an Exchange connector and your company has an Exchange 5.5 mail server.

Repeat the following procedure until the server account has Service Account Admin permissions on each of these levels:

- *Organization*: Server must be able to enumerate the sites for installation.
- *Site*: Server must be able to run the Genifax connector on the Exchange Server.
- *Configuration*: Server must be able to add the Exchange connector during installation.

To give the server account Service Account Admin permissions to Exchange 5.5 Server organizations, sites, and configurations:

1. Start the Exchange Administrator.
2. Click on an Organization, Site, or Configuration in the console tree.
3. Click the **File** menu and select **Properties**.
4. Click the **Permissions** tab.
5. Click the **Add** button, select the server account, and click **OK**.
6. Select **Service Account Admin** from the *Roles* drop-down menu.
7. Click **Apply**.
8. Click **OK** to save your changes to the Organization, Site, or Configuration.



Selecting a logon account for Xerox MFDs (for servers with a XeroxScan connector)

Select a logon account for Xerox WorkCentre Pro or Document Centres¹ that copy scanned documents to the scan repository in the default FTP site on the AccuRoute or Genifax server. (Note that you will create the default FTP site on the server in the next section.)

This account must:

- be an Administrator on the local computer
- have a password that never expires
- have read and write access to the scan repository

For instructions on creating a user account, go to the next section: "Creating Windows user accounts".

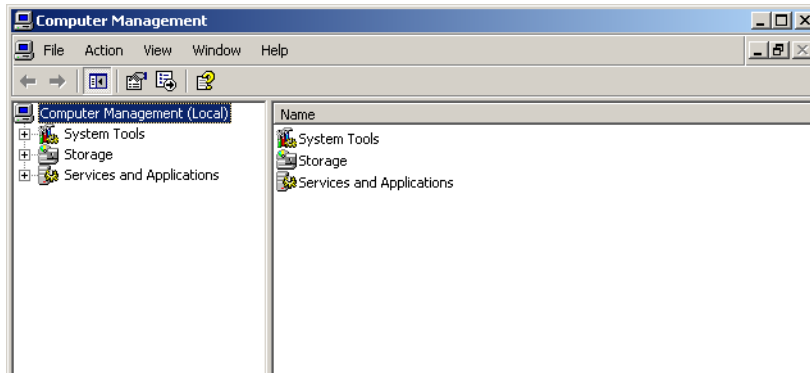
1. WorkCentre Pro or Document Centre multifunction devices

Creating Windows user accounts

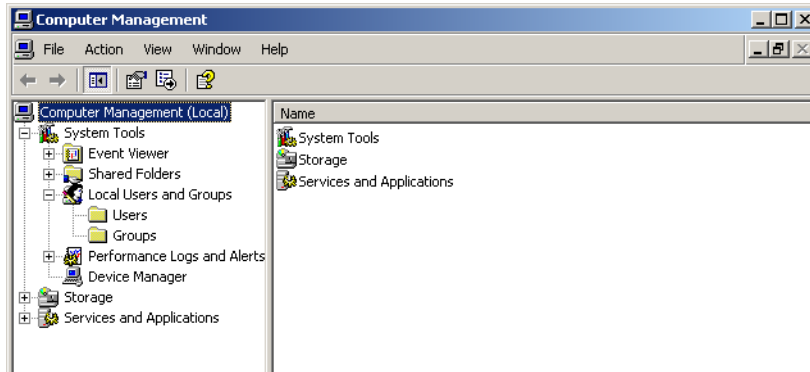
Tip: This procedure might vary depending on your operating system. Consult Windows help for instructions on creating user accounts.

To create a Windows user account:

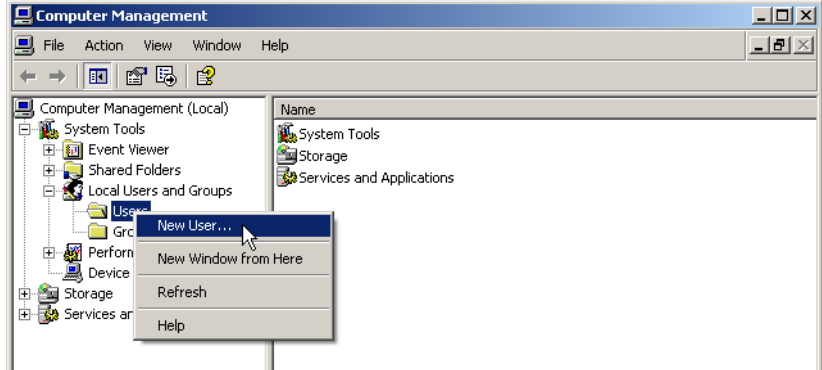
1. Log on to the computer where you will install the server software.
2. Click **Start** and select **Programs > Administrative Tools > Computer Management**.



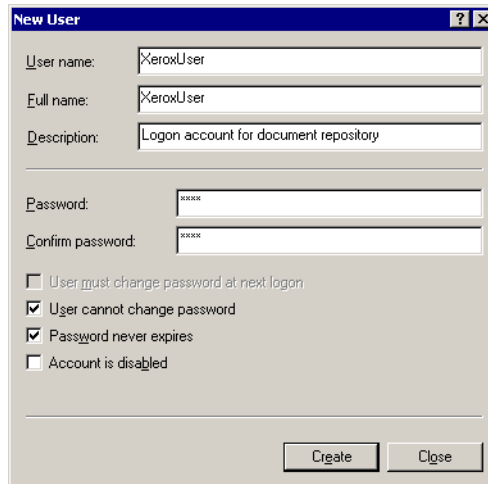
3. In the Computer Management console, expand *System Tools* and then *Local Users and Groups*.



4. Under *Local Users and Groups*, right-click **Users** and select **New User**.



5. In the **New User** window, select a user name for this account such as *OmttoolAdmin* for the server account or *XeroxMFD* for the XeroxMFD account and type it in the *User name* text box. Complete the *Full name* and *Description* fields. Type the password for this account in the *Password* and *Confirm password* text boxes. Clear the **User must change password at next logon** option. Select the **User cannot change password** and **Password never expires** options. Do not select the **Account is disabled** option.



6. Click **Create** and then **Close**.
7. Close the Computer Management console.

Tip: If you created a server account, remember to add the account to the **Administrators** group on the local computer and to the **Domain Users** group in the server's domain. For more information on adding users to groups, consult **Windows help**.

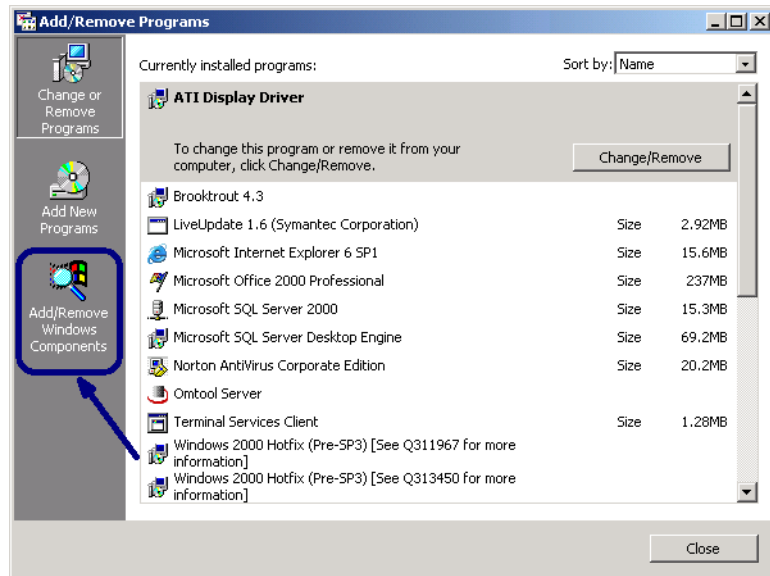
Installing IIS

The Web Client, SMTP connector, and XeroxScan connector all require Internet Information Services (IIS). Install this application if necessary.

Note: This application is installed by default on a Windows 2000 Server, but not on a Windows 2003 Server.

To install IIS:

1. Start the **Add/Remove Programs** applet in the Windows Control Panel.



2. Click **Add/Remove Windows Components**.

Note: In Windows 2003, IIS is located inside the Application Server folder.

3. Do one of the following:
 - **Windows 2000:** Select **Internet Information Services (IIS)** and click **Details**.
 - **Windows 2003:** Select **Application Server** and click **Details**. Select **Internet Information Services (IIS)** and click **Details**.
4. Do one of the following:
 - **Windows 2000:** Select **File Transfer Protocol Server, Common Files, Internet Information Services Snap-In, and SMTP Service**, and click **OK**.
 - **Windows 2003:** Select **File Transfer Protocol Service, Common Files, Internet Information Services Manager, and SMTP Service**, and click **OK**.
5. Click **Next** and begin updating the Windows components. (You might need the Windows installation CD to add Windows components to the server.)
6. Click **Finish**. When the installation completes, close Add/Remove Programs.

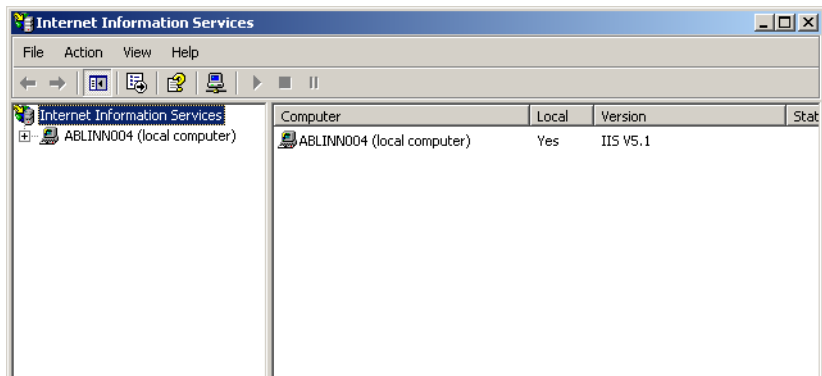
Creating a scan repository for the XeroxScan connector

Xerox MFDs copy scanned documents to a scan repository. The XeroxScan connector routinely polls the scan repository, detects scanned documents, and collects them. Create a scan repository if the AccuRoute or Genifax server has a XeroxScan connector.

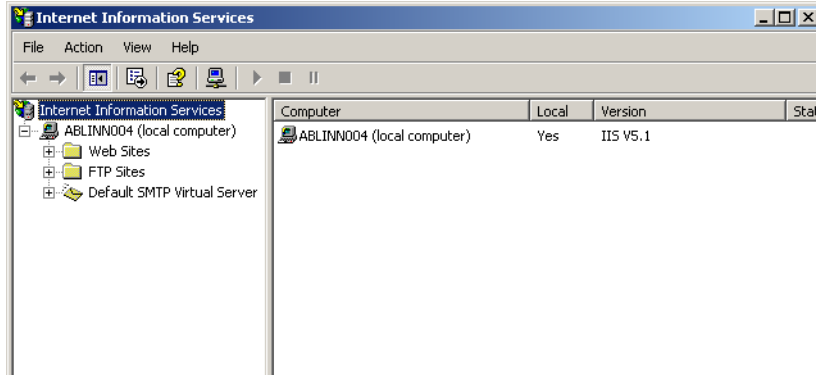
Note: You can use one scan repository or multiple scan repositories to accommodate all the Xerox MFDs in the network.

To create a scan repository in the default FTP site:

1. Click **Start** and select **Programs > Administrative Tools > Internet Services Manager**.

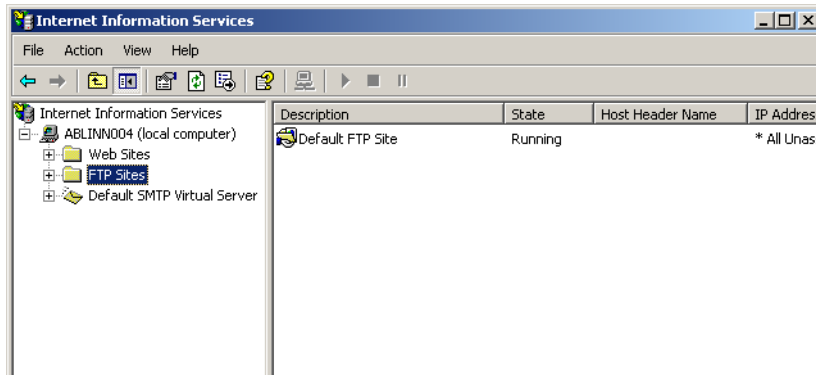


2. Expand *computer name*.

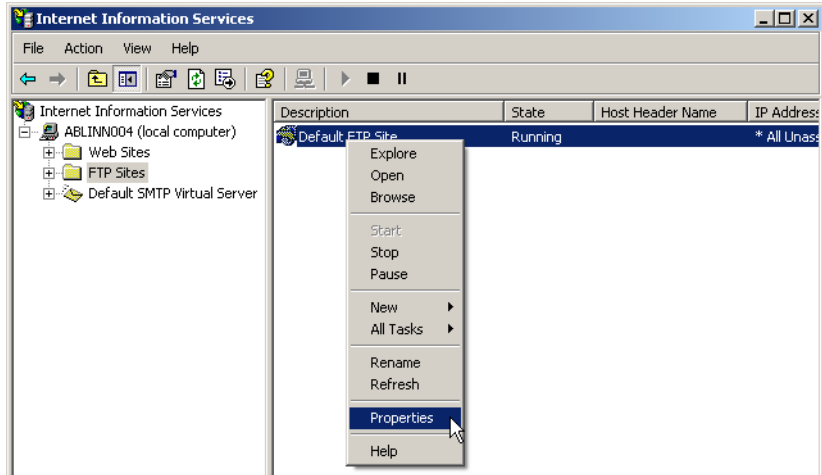


3. Click **FTP Sites**.

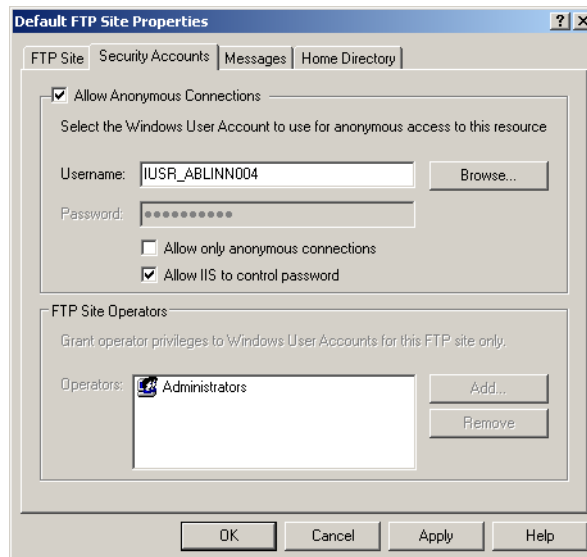
Tip: If *FTP Sites* does not appear in the console tree, the **File Transfer Protocol Server** component has not been installed. Reinstall IIS with this component. (See "Installing IIS" on page 26.)



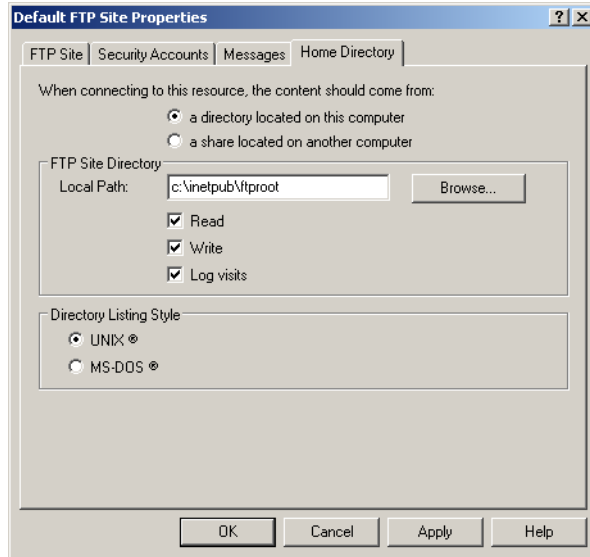
4. Right-click **Default FTP Site** and select **Properties**.



5. Click the **Security Accounts** tab. Clear the **Allow only anonymous connections** option if it is selected.



- Click the **Home Directory** tab and verify that the *Local Path* represents the directory you want to use as your scan repository.



- Under *FTP Site Directory*, select **Read** and **Write** access. Select **Unix** as the *Directory Listing Style*.
- Click **Apply** and click **OK**.

Installing fax boards, Windows drivers, and Omtool firmware

Downloading the latest update for your fax board

Omtool periodically releases updates for your fax board model. Each update contains Windows plug and play drivers and Omtool firmware.

Before you continue, go to the Omtool Support web site² and check to see whether Omtool has issued any updates since this version of AccuRoute or Genifax was released. If you find updates for your fax board model, download the most recent update. Then proceed to the next section and install the Windows plug and play drivers.

Installing the fax board

Important! Wear a grounding device when you install the fax board. This prevents static electricity that can damage the circuit board.

To install the fax board:

1. Shut down the computer and remove the cover.
 2. Insert the fax board into an unoccupied PCI slot. Screw the mounting bracket onto the system frame. (If you have multiple boards, consult the documentation in the shipping container.)
 3. Replace the cover.
 4. Connect the fax board to your telephone system. Plug the telephone cords into the connectors on the fax board.
 5. Note the telephone numbers associated with each channel.
 6. Start the computer and log on using the server account.
-
2. To access downloads on the Omtool Support web site, go to <http://www.omtool.com/support/index.cfm> and log in. (If you cannot log in or do not know your login number, contact Omtool Customer Service using the telephone number provided.) Click Downloads & Docs in the navigation pane. Locate the downloads for your product and browse for new drivers.

After the computer reboots, the Windows New Hardware wizard detects the board. Proceed to the next section and install the plug and play drivers for your fax board model.

Installing Windows plug and play drivers

For Windows 2003, go to the next section. For Windows 2000, go to "Windows 2000" on page 34.

Windows 2003

The *Welcome to the Found New Hardware Wizard* screen appears on the desktop. Complete the wizard and install the Windows plug and play drivers.

Note: If you have a TruFax board, Windows 2003 detects the board, installs the plug and play drivers automatically, and adds the board to Device Manager.³ Proceed to "Installing Omttool firmware" on page 36.

Important! This procedure instructs you to locate the Windows plug and play drivers yourself and install them from the AccuRoute or Genifax installation CD. Follow this procedure as documented—do not allow Windows to locate and install the drivers automatically.

To complete the Windows New Hardware wizard on Windows 2003:

1. Select the *No, not this time* option and click **Next**.
2. Select the *Install from a list of specific location (Advanced)* option and click **Next**.
3. Select the *Don't search. I will choose the driver to install.* option and click **Next**.
4. Select **Brooktrout Hardware** in the *Common hardware types* list and click **Next**.
5. Click **Have Disk**.
6. Locate the setup information for your fax board model. If you downloaded an update from the Support web site, use the special instructions that follow. Otherwise, use the instructions on installing the drivers from the installation CD.

-
3. When Windows cannot complete the installation automatically, the Windows New Hardware wizard appears on the desktop. In this case, complete the Windows plug and play drivers installation manually.

Download: Click **Browse** on the *Install From Disk* dialog box and navigate to the directory where you extracted the download. Select the *.INF file that contains the setup information for your board and click **Open**. Depending on the board model you are using, open the *.INF file in one of the following directories:

- **TRI034:** ...\bostonnpn\
- **TRI14:** ...\BFax4.3\BFAXPNP\
- **TruFax:** ...\TruFax\BFAXPNP\

Installation CD: Click **Browse** on the *Install From Disk* dialog box and insert the CD into the CD-ROM drive. Select the *.INF file that contains the setup information for your board and click **Open**. Depending on the board model you are using, open the *.INF file in one of the following directories:

- **TRI034:** ...Tools\ModemDrivers\Brooktrout\Boston4.7\bostonnpn\
- **TRI14:** ...Tools\ModemDrivers\Brooktrout\BFax4.3\BFAXPNP\
- **TruFax:** ...Tools\ModemDrivers\Brooktrout\TruFax\BFAXPNP\

7. Click **Next** to install the device driver for your board.
8. Click **Yes** if the Windows New Hardware wizard displays a security alert pertaining to the digital signature.
9. Click **Finish** on the *Completing the Found New Hardware Wizard* screen.
10. Reboot the system.

Proceed to "Installing Omttool firmware" on page 36.

Windows 2000

The *Welcome to the Found New Hardware Wizard* screen appears on the desktop. Complete the wizard and install the Windows plug and play drivers.

Tip: If the **New Hardware wizard** does not detect the hardware and launch automatically, start the **Add Hardware applet** in the **Control Panel** and continue.

To complete the Windows New Hardware wizard on Windows 2000:

1. Click **Next** on the *Welcome* screen.
2. Click **Next** on the *Install Hardware Device Drivers* screen.

3. Clear the **Floppy Disk Drivers** and the **CD-ROM drives** options, select the **Specify a location** option, and click **Next** on the *Locate Driver Files* screen.
4. Locate the setup information for your fax board model. If you downloaded an update from the Support web site, follow the special instructions that follow. Otherwise, use the instructions on installing the drivers from the installation CD.

Download: Click **Browse** on the *Install From Disk* dialog box and navigate to the directory where you extracted the download. Select the *.INF file that contains the setup information for your board and click **Open**. Depending on the board model you are using, open the *.INF file in one of the following directories:

- **TRI034:** ...**bostonnpn**\
- **TRI14:** ...**BFax4.3\BFAXPNP**\
- **TruFax:** ...**TruFax\BFAXPNP**\

Installation CD: Click **Browse** on the *Install From Disk* dialog box and insert the CD into the CD-ROM drive. Select the *.INF file that contains the setup information for your board and click **Open**. Depending on the board model you are using, open the *.INF file in one of the following directories:

- **TRI034:** ...**Tools\ModemDrivers\Brooktrout\Boston4.7\bostonnpn**\
- **TRI14:** ...**Tools\ModemDrivers\Brooktrout\BFax4.3\BFAXPNP**\
- **TruFax:** ...**Tools\ModemDrivers\Brooktrout\TruFax\BFAXPNP**\

5. Click **OK** on the *Found New Hardware Wizard* dialog box.
6. Click **Next** on the *Driver Files Search Results* screen to begin installing the drivers.
7. Click **Finish**.
8. Click **Yes** to restart your computer.

Log on to the computer using the server account and proceed to the next section.

Installing Omtool firmware

TR1034 series boards

Installing Brooktrout TRxStream drivers

To install drivers for a TR1034 series board:

1. Log on to the computer where you installed the fax board.
2. Run the setup program.

Download: If you downloaded an update from the Support web site, go to the directory where you extracted the download and double-click **setup.exe**. The setup program displays the *Welcome* screen.

Installation CD: Insert the installation CD into the CD-ROM drive, Navigate to ...\\Tools\\ModemDrivers\\Brooktrout\\Boston4.7\\ and double-click **setup.exe**. The setup program displays the *Welcome* screen.
3. Click **Next**. The *Choose Destination Location* screen appears.
4. Click **Next** to accept the default destination location. (If you want to change the destination location, click **Browse**, navigate to the directory where you want to install the 4.7 drivers, click **OK**, and click **Next**.) The *Start Copying Files* screen appears.
5. Review the installation settings and click **Next** to begin the installation.
6. Click **Finish** on the *InstallShield Wizard Complete* screen.

Configuring the fax board

To configure your fax board:

1. Click **Start** and select **Programs > Omtool Utilities > Brooktrout Configuration**.
2. Click **OK** on the *Brooktrout Configuration Tool - Preferences* dialog box.
3. Select an Interface Type (**TI**, **EI**, **BRI**, or **Analog**), select your board model in the list, and click **OK**. The *Brooktrout Configuration Tool* screen appears on the desktop.
4. Select your fax board model in the console tree (under *Brooktrout > Call Control Parameters*).
5. Click the **Port A** tab.

6. Select a line protocol (**TI ISDN** or **TI Robbed Bit**) in the *Protocol Options* menu at the top. (If you change the protocol type, your screen changes.) Do one of the following:
 - If you selected **TI ISDN**, locate the *Protocol*⁴ and *Switch Type*⁵ settings, and verify that the selected options describe the protocol variant and the switch type accurately.
 - If you selected **TI Robbed Bit**, locate the *Max DID Digits*⁶ and *Max DID Timeout*⁷ settings and configure them appropriately. Also, locate the *Line Type*⁸ setting and verify that the selected option describes your line type correctly.

Important! Important! By default, Max DID Digits is set to 0. The board cannot accept inbound faxes with this configuration. Change this setting to reflect the maximum number of DID digits inbound faxes should have.

7. Click **Apply** and click **OK** on the *Configtool Warning* dialog box.
8. Close the Brooktrout Configuration Tool.

Sending test faxes

To test the channel's receive capability, send a test fax to the channel:

1. Open a Windows command prompt.
2. Type `CD \Boston\test` and press **ENTER**.
3. Type `fax -u [channel#] -r test.ips` and press **ENTER**.

Note: [channel#] represents the channel you are testing. The channel assigns the file name "test.ips" to the inbound test fax.
For example: `fax -u 0 -r test.ips`

-
4. This parameter specifies the protocol variant to use for the port.
 5. This parameter specifies the switch type used for board connection.
 6. This parameter specifies the maximum number of DID digits to wait for before accepting an incoming call. Set this parameter to '0' to disable waiting for DID digits. The system reports all of the DID digits to the application even if the number of received DID digits exceeds the number specified for 'Max DID Digits'. Use the did offset parameter to strip digits from the string before the system passes them to the application.
 7. This parameter specifies the maximum timeout (in seconds) allowed before processing the call after assuming receipt of the last DID digit. Default value 0 indicates no waiting time.
 8. This parameter specifies the type of framing to use for the port.

The Command Prompt window displays a series of messages indicating that the channel is in receive mode and ready to receive a fax.

4. Go to a fax machine, insert a test fax, and dial the telephone number of the fax board channel.

The Command Prompt window displays a series of messages indicating that the channel received the fax.

5. Navigate to the \Boston\test folder and locate the test.ips file. The file size varies depending on the test fax, but should be greater than 0 KB.

To test the channel's send capability, send the test fax to the fax machine:

1. Type `fax -u [channel#] -s w[phone#] test.ips` and press **ENTER**.

Note: [channel#] represents the channel you are testing and [phone#] represents the telephone number associated with the fax machine. "test.ips" represents the file name of the test fax; this file was created in the \Boston\test directory when you sent a test fax to the channel.
For example: `fax -u 0 -s w1234567 test.ips`

2. Go to the fax machine and retrieve the test fax.

TR114 series boards

Installing Brooktrout 4.3 drivers

To install drivers for a TR114 series board:

1. Log on to the computer where you installed the fax board.
2. Run the setup program.

Download: If you downloaded an update from the Support web site, go to the directory where you extracted the download and double-click **setup.exe**. The setup program displays the *Welcome* screen.

Installation CD: Insert the installation CD into the CD-ROM drive, Navigate to ...\\Tools\\ModemDrivers\\Brooktrout\\BFax4.3\\ and double-click **setup.exe**. The setup program displays the *Welcome* screen.

3. Click **Next** on the *Welcome* screen.
4. Type the total number of channels you want this computer to support and click **Next** on the *Channel Count* screen. (If you do not know the total number of channels this computer should support, use the default value, 64.)

5. Select the option that describes your ISDN configuration and click **Next** on the *ISDN Support* screen.

Tip: If you are using **Primary Rate ISDN**, select **ISDN**. If you are using **Basic Rate ISDN**, select **ISDN2**.

If you select an ISDN option, the *ISDN Line Properties* screen appears. Select an option from *Line Configuration*, *Ports*, *Frame Type/Line Code*, and *Switch/Variant Type* drop-down menus and click **Next**.

Note: If you do not know the configuration of your ISDN line, consult the documentation in the fax board shipping container or contact your telephone service provider.

6. Click **Next** on the *Choose Destination Location* screen to install the drivers in the default location. If you want to change the target installation directory, click **Browse**, navigate to the directory where you want to install the drivers, select it, and click **OK**.
7. Review the install settings and click **Next** on the *Start Copying Files* screen.
8. Click **OK** or **Finish** on the *Setup Complete* dialog box.

Initializing the board and sending test faxes

To initialize the fax board:

1. Open a Windows command prompt.
2. Type `CD \bfax\user` and press **ENTER**.
3. Type `faxinit -n` and press **ENTER**.

To test the channel's receive capability, send a test fax to the channel:

1. Type `CD \bfax\test` and press **ENTER**.
2. Type `fax -u [channel#] -r test.ips` and press **ENTER**.

Note: [channel#] represents the channel you are testing. The channel assigns the file name "test.ips" to the inbound test fax.
For example: `fax -u 0 -r test.ips`

The Command Prompt window displays a series of messages indicating that the channel is in receive mode and ready to receive a fax.

3. Go to a fax machine, insert a test fax, and dial the telephone number of the fax board channel.

The Command Prompt window displays a series of messages indicating that the channel received the fax.

4. Navigate to the \bfx\test folder and locate the fax. The file size varies depending on the test fax, but should be greater than 0 KB.

To test the channel's send capability, send the test fax to the fax machine:

1. Type `CD \bfx\test` and press **ENTER**.
2. Type `fax -u [channel#] -s w[phone#] test.ips` and press **ENTER**.

Note: [channel#] represents the channel you are testing and [phone#] represents the telephone number associated with the fax machine. "test.ips" represents the file name of the test fax; this file was created in the \bfx\test directory when you sent a test fax to the channel.
For example: `fax -u 0 -s w1234567 test.ips`

3. Go to the fax machine and retrieve the test fax.

TruFax series boards

Installing Brooktrout 4.3 drivers

To install drivers for a TruFax series board:

1. Log on to the computer where you installed the fax board.
2. Run the setup program.

Download: If you downloaded an update from the Support web site, go to the directory where you extracted the download and double-click **setup.exe**. The setup program displays the *Welcome* screen.

Installation CD: Insert the installation CD into the CD-ROM drive, Navigate to ...Tools\ModemDrivers\Brooktrout\TruFax\ and double-click **setup.exe**. The setup program displays the *Welcome* screen.

3. Click **Next** on the *Welcome* screen.
4. Click **Next** on the *Choose Destination Location* screen to install the drivers in the default location. If you want to change the target installation directory, click **Browse**, navigate to the directory where you want to install the drivers, select it, and click **OK**.

5. Review the install settings and click **Next** on the *Start Copying Files* screen.
6. Click **OK** on the *Setup Complete* dialog box.

Initializing the board and sending test faxes

To initialize the fax board:

1. Open a Windows command prompt.
2. Type `CD \bfx\user` and press **ENTER**.
3. Type `faxinit -n` and press **ENTER**.

To test the channel's receive capability, send a test fax to the channel:

1. Type `CD \bfx\test` and press **ENTER**.
2. Type `fax -u [channel#] -r test.ips` and press **ENTER**.

Note: [channel#] represents the channel you are testing. The channel assigns the file name "test.ips" to the inbound test fax.
For example: `fax -u 0 -r test.ips`

The Command Prompt window displays a series of messages indicating that the channel is in receive mode and ready to receive a fax.

3. Go to a fax machine, insert a test fax, and dial the telephone number of the fax board channel.

The Command Prompt window displays a series of messages indicating that the channel received the fax.

4. Navigate to the \bfx\test folder and locate the test fax. The file size varies depending on the test fax, but should be greater than 0 KB.

To test the channel's send capability, send the test fax to the fax machine:

1. Type `fax -u [channel#] -s w[phone#] test.ips` and press **ENTER**.

Note: [channel#] represents the channel you are testing, [phone#] represents the telephone number associated with the fax machine, and "test.ips" represents the file name of the test fax; this file was created in the \bfx\test directory when you sent a test fax to the channel.
For example: `fax -u 0 -s w1234567 test.ips`

2. Go to the fax machine and retrieve the test fax.

Installing the Web Client (for servers with faxing capability only)

The Web Client is an intranet-based application that allows users to send and receive faxes, and access real-time information about the status of these faxes. Furthermore, the Web Client allows users to preview and approve faxes before the server delivers them to their final destinations.

To install the Web Client:

1. Log on to the AccuRoute or Genifax server and insert the installation CD into the CD-ROM drive.
2. Navigate to the \Clients\GenifaxWeb directory and double-click **setup.exe**. The InstallShield Wizard launches and displays the *Welcome* screen.
3. Click **Next**. The *License Agreement* screen appears.
4. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.
5. Click **Next** to accept the default destination location. (If you want to change the destination location, click **Browse**, navigate to the directory where you want to install the Web Client, click **OK**, and click **Next**.) The *Genifax Server* screen appears.
6. Type the computer name or IP address of the server⁹ in the *Genifax Server* text box and click **Next**. The *Mail System* screen appears.
7. Select the **Microsoft Exchange**, **Lotus Notes**, or **Novell GroupWise**¹⁰ option depending on the mail system your company uses and click **Next**. The next several screens vary, depending on the mail system you selected.

9. This is the computer name of the system where you are installing the Web Client.

10. The Novell GroupWise option is not supported in this release.

8. Do one of the following:

- If you selected Microsoft Exchange in the previous step, the *E-Mail Address Lookup* screen appears. Select the **2003** option if your company's mail server is Exchange Server 2003, select the **2000** option if your company's mail server is Exchange Server 2000, or select the **5.5** option if your company's mail server is Exchange Server 5.5. Type the computer name or IP address of the lookup server in the *Lookup Server* text box and click **Next**. The *Look User Account* screen appears.

Type the appropriate logon credentials for the lookup user in the *Domain*, *User Name*, *Password*, and *Confirm Password* text boxes, and click **Next**. The *Start Copying Files* screen appears.

- If you selected Lotus Notes in the previous step, the *E-Mail Address Lookup* screen appears. Type the computer name or IP address of the lookup server in the *Server Name* text box, and type the search scope in the *LDAP Search Scope* text box, and click **Next**. The *Start Copying Files* screen appears.

9. Review the installation settings and click **Next** to begin installing the Web Client. (If you need to make any changes to the installation settings, click the **Back** button until you find the screen with the settings you want to change. Then proceed through the appropriate steps to get to this point again.)

10. Click **Finish** when the *InstallShield Complete* screen appears.

Now that you have installed the Web Client, you need to enable Windows authentication on the web server. Proceed to the next section.

Configuring Windows authentication on the web server

Using the following procedure, you will enable the Web Client to use Windows authentication. With Windows authentication, the authentication process for the Web Client becomes automatic—this eliminates the need for the user to supply logon credentials when trying to access the Web Client.



To configure Windows authentication on the web server:

1. Click the **Start** button and select **Programs > Administrative Tools > Internet Services Manager**.
2. In the Internet Information Services console tree, expand the server where the Web Client is installed and then expand *Default Web Site*.
3. Select **Genifax** in the console tree.
4. Right-click on **Login-User.asp** in the details pane and select **Properties**.
5. Click the **File Security** tab.
6. Under *Anonymous access and authentication control*, click **Edit**. The *Authentication Methods* dialog box appears.
7. Clear the **Anonymous access** option if necessary.
8. Select the **Integrated Windows Authentication** option under *Authenticated access*.
9. Click **OK**.
10. Click **OK** to close the *Login-User.asp Properties* dialog box.

Now that you have enabled Windows authentication on the web server, you need to enable Windows authentication on clients with Internet Explorer 6.0. Proceed to the next section.

Configuring Windows authentication on client systems with Internet Explorer 6.0

Note: You do not need to perform these steps for client systems with Internet Explorer 5.5.

To configure Windows authentication on client systems with Internet Explorer 6.0:

1. Log on to the client system and start Internet Explorer 6.0.
2. Click the **Tools** menu and select **Internet Options**.
3. Click the **Advanced** tab.

4. Select the **Enable Integrated Windows Authentication (requires restart)** option under *Security*.
5. Click **OK**.
6. Restart Internet Explorer.

Adding the Web Client as a trusted site (Windows 2003 only)

Windows 2003 servers have a higher default security level than Windows 2000 servers. If you want to be able to access the Web Client on the server, you must add the Web Client as a trusted site in Windows Internet options on the server.

To add the Web Client as a trusted site:

1. Click **Start** and select **Settings > Control Panel > Internet Options**.
2. Click the **Security** tab.
3. Select the **Trusted sites** web content zone and click the **Sites** button.
4. Clear the **Require server verification (https:) for all sites in this zone** option if it is selected.
5. Type the URL for the Web Client in the *Add this Web site to the zone* text box and click **Add**.
6. Click **Close** to save your changes.



Chapter 4: Installing the server software

In this chapter...

- "Selecting a database application" on page 48
- "Installing the server software" on page 50
- "Completing the server configuration wizard" on page 56
- "Creating a rule for the SMTP connector (for AccuRoute servers)" on page 57
- "Disabling a channel for ISDN (for servers with faxing capability)" on page 59
- "Sending a Quick Fax (for servers with faxing capability)" on page 60

Selecting a database application

AccuRoute and Genifax servers require a database application that supports SQL databases. You can use either of the following solutions:

- Install *Microsoft SQL Server 2000 Desktop Engine* (MSDE) with SP3 on the AccuRoute or Genifax server. Note that MSDE only supports databases smaller than 2 GB. Your AccuRoute or Genifax installation CD includes this application. (See "Installing MSDE" on page 48.)
- Install SQL Server 2000¹ on a server that is on the same switch as the AccuRoute or Genifax server.

Important! If you install this application on the AccuRoute or Genifax server, SQL Server should support only databases associated with AccuRoute or Genifax.

Installing MSDE

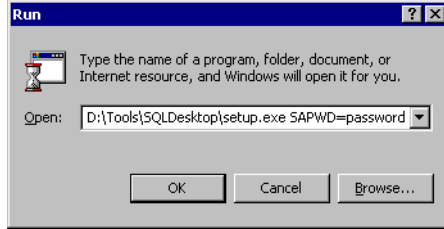
Microsoft implemented security protocol that requires you to provide an SA password when you install MSDE. The following installation procedure enables you to provide the required SA password in the command line.

To install MSDE:

1. Log on to the computer where you will install the server software, and insert the AccuRoute or Genifax installation CD into the CD-ROM drive.
2. Click **Start** and select **Run**. The *Run* dialog box appears.
3. Click **Browse**, navigate to the \Tools\SQLDesktop\ directory on the CD, select **setup.exe**, and click **Open**.
4. Position the cursor at the end of the command line and type `SAPWD=[password]` whereby `[password]` is the SA password you want to specify.

1. Omtool distributes MSDE, but cannot distribute or license SQL Server 2000. You can purchase this enterprise database application from Microsoft.

The *Run* dialog box should look similar to the following example:



5. Press **ENTER**. The Windows Installer for Microsoft SQL Server Desktop Engine launches and installs the application.
6. Click **Yes** to restart the system.

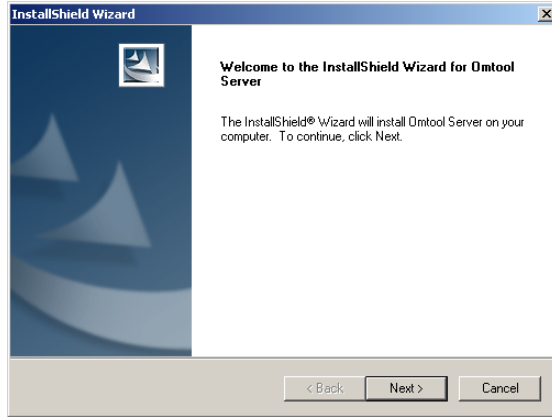
Installing the server software

Important! Before you proceed, verify that you are running MSDE or SQL Server 2000 in a supported configuration. (See "Selecting a database application" on page 48.)

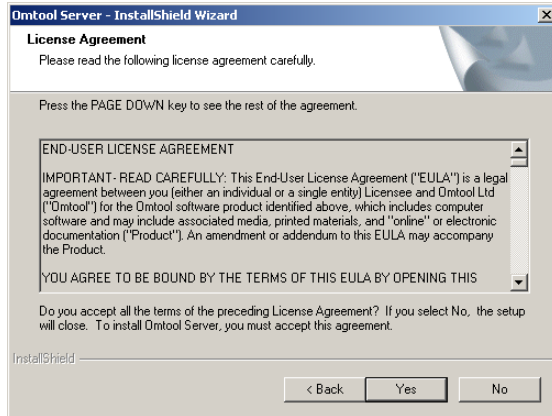
To install the server software:

1. Log on to the computer where you want to install the server software and insert the AccuRoute or Genifax installation CD into the CD-ROM drive.
2. Do one of the following:
 - **AccuRoute:** Navigate to the \MessageServer directory on the CD and double-click **setup.exe**.
 - **Genifax:** Launch the Genifax Installation Manager:
 - a. Navigate to the \Tools directory on the CD and double-click **setup.exe**.
 - b. Click **Install Server** on the main screen.
 - c. Click the link that describes your company's configuration under *Typical Configurations*. The Genifax Installation Manager checks your computer for pre-installation requirements and displays the results. (A green check mark indicates that your computer meets a requirement.) Review and complete the requirements until all have green check marks.
 - d. Click **Install** to begin the installation after you have met all the appropriate the installation requirements for your configuration.

The InstallShield Wizard launches and displays the *Welcome* screen.

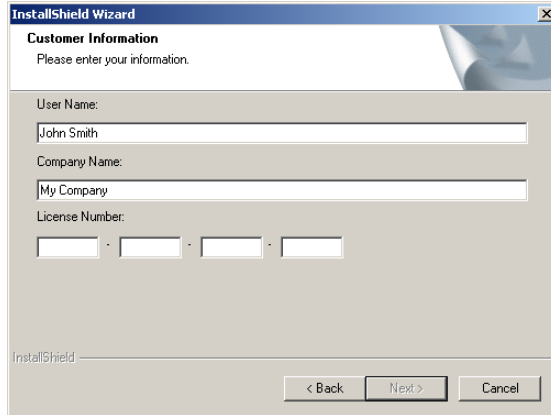


3. Click **Next**. The *License Agreement* screen appears.



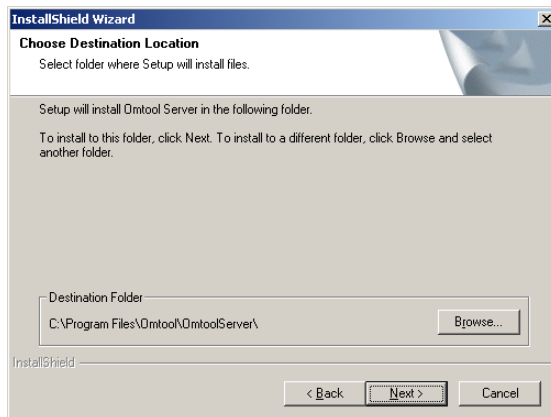
4. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.)

The *Customer Information* screen appears.



The screenshot shows the 'InstallShield Wizard' window with the 'Customer Information' tab selected. The window title is 'InstallShield Wizard' and it has a close button (X) in the top right corner. Below the title bar, the text reads 'Customer Information' and 'Please enter your information.' The form contains three input fields: 'User Name' with the text 'John Smith', 'Company Name' with the text 'My Company', and 'License Number' which is a four-part field with dashes. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted.

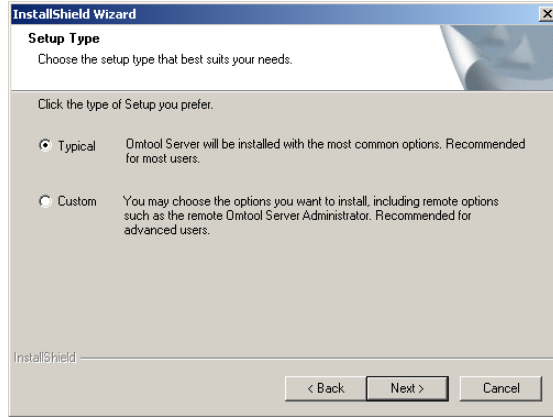
5. Type your user name in the *User Name* text box, your company name in the *Company Name* text box, and your license key in the *License Number* text boxes, and click **Next**. The *Choose Destination Location* screen appears.



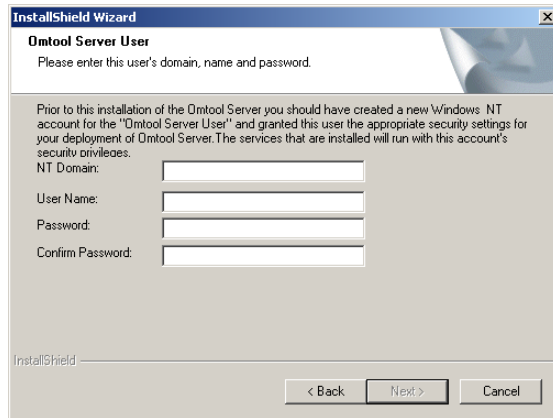
The screenshot shows the 'InstallShield Wizard' window with the 'Choose Destination Location' tab selected. The window title is 'InstallShield Wizard' and it has a close button (X) in the top right corner. Below the title bar, the text reads 'Choose Destination Location' and 'Select folder where Setup will install files.' The main area contains the text: 'Setup will install Omtool Server in the following folder.' and 'To install to this folder, click Next. To install to a different folder, click Browse and select another folder.' Below this text is a 'Destination Folder' text box containing the path 'C:\Program Files\Omtool\OmtoolServer\' and a 'Browse...' button. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'Next >' button is highlighted.

6. Click **Next** to accept the default destination location. (If you want to change the destination location, click **Browse**, navigate to the directory where you want to install the server software, click **OK**, and click **Next**.)

The *Setup Type* screen appears.

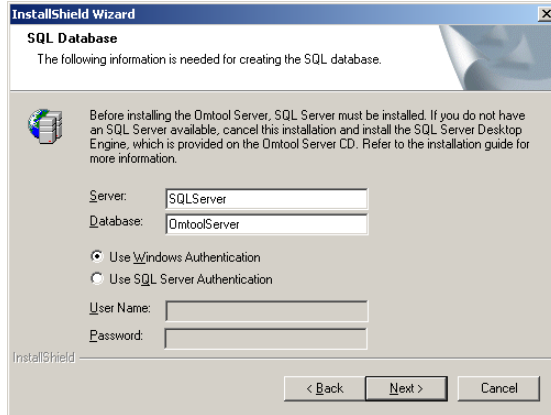


7. Click **Next** to install all the options for the server software. The *Omtool Server User* screen appears.



8. Provide the logon credentials associated with the user account you have designated for the server. Type the domain in the *NT Domain* text box, the user name in the *User Name* text box, and the password in the *Password* and *Confirm Password* text boxes, and click **Next**.

The *SQL Database* screen appears.



9. Type the name of the computer where you want to create the database in the *Server* text box.

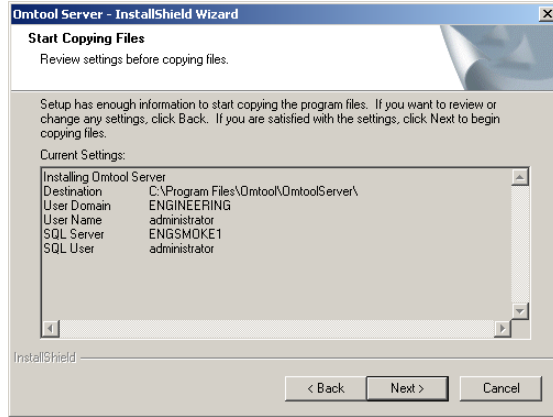
Note: If you will create a cluster that provides failover support for your **AccuRoute** or **Genifax** server, the database must reside on the database server. (See "Clustering" on page 121.)

The *Database* text box displays the name of the database² that will be created; change the name of the database if desired.

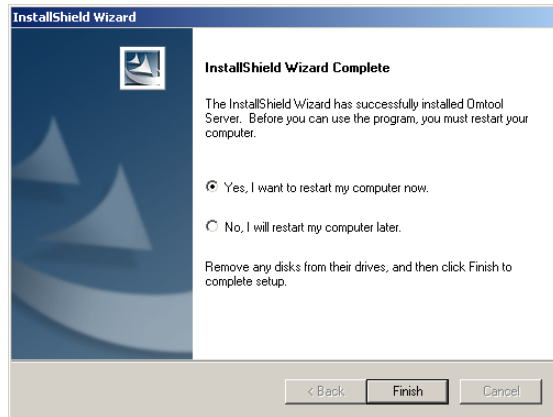
10. Choose the type of authentication³ you want the server to use when it accesses this database. Select the **Use Windows Authentication** option if you want the server to use Windows authentication to access the database, or select the **Use SQL Server Authentication** option if you want the server to use SQL authentication to access the database. If you select the **Use SQL Server Authentication** option, type the user name and password you want the server to use in the *User Name* and *Password* text boxes. Click **Next**.

-
2. The database stores information about items on the server. The server writes to this database and queries it constantly.
 3. When you reboot the server (or the system where the database is located), the server must authenticate itself to access the database.

The *Start Copying Files* screen appears.



11. Review the installation settings and click **Next** to begin installing the server software. (If you need to make any changes to the installation settings, click the **Back** button until you find the screen with the settings you want to change. Then proceed through the appropriate steps to get to this point again.) The *InstallShield Wizard Complete* screen appears.



12. Click **Finish** to restart your computer.

When your computer restarts, the server configuration wizard runs. This utility creates the server database and configures some of the features that your license key includes. Proceed to the next section for more information about the server configuration wizard.

Completing the server configuration wizard

When you install the server software and restart the computer, the server configuration wizard launches and helps you set up some of the features associated with your server license:

- If your license includes a mail connector, such as Exchange, the server configuration wizard prompts you to enter information about your mail server which might include the computer name of the mail server and the computer name of the lookup server.
- Additionally, the server configuration wizard attempts to detect the fax board channels on the server. If you do not have a fax board installed on the server but have a fax board installed on another system in your network, you need to detect the channels manually⁴. (See "Detecting the fax board channels on the remote Modem Server" on page 119.)

You must complete the server configuration wizard before you can launch the Administrator.

Note: If you are installing the server software on the secondary server in a cluster, do not complete the server configuration wizard. For more information about clustering, go to "Clustering" on page 121.

4. You must install the Modem Server software on the remote system before you can detect the channels.

Creating a rule for the SMTP connector (for AccuRoute servers)

Note: You should complete this procedure if your company has an AccuRoute server with an SMTP connector and uses this connector to route outbound e-mail messages.

If your license key includes an SMTP connector, then an SMTP connector should have been added to the server during the installation. (To see if an SMTP connector was installed with your server, start the Administrator, click **Connectors** in the console tree, and look in the details pane for the SMTP connector.)

The SMTP connector requires an outbound rule that routes all documents and faxes with an e-mail destination to the SMTP connector for delivery. If you used an AccuRoute license key to install the server software, then you need to create this rule manually. (The server configuration wizard creates this rule automatically on a Genifax server.)

To create a rule that routes documents and faxes with an e-mail destination to the SMTP connector:

1. Start the Administrator. (If necessary, expand *Omtool Server Administrator* and expand the *computer name* of the AccuRoute server with an SMTP connector.)
2. Expand *Rules*.
3. Right-click **Outbound** and select **New > Rule**. The rules wizard appears on the desktop.
4. Click the **Add** in the *Specify the Criteria for this Rule* screen. Select the **Destination is an e-mail address** option and click **Next**. Select the **is** option, type * in the text box, click **Add**, and click **Finish**. The criteria *Where Destination is an e-mail address is ** appears in the list. Click **Next**.



5. Click the **Add** in the *Specify the Actions to take for this Rule* screen. Select the **Route to Connector** option and click **Next**. Select **SMTP on the Server** in the *Route to Connector* menu. Configure other options as desired and click **Finish**. (You can modify this rule later if you want to enable or disable an option associated with this rule.) Click **Next**.
6. Click **Next** in the *If any Action(s) fail do the following* screen.
7. Click **Finish** in the *Specify a name for this Rule* screen.

Disabling a channel for ISDN (for servers with faxing capability)

ISDN utilizes a channel on the fax board for internal reporting purposes. If you use ISDN, you need to disable a channel⁵. If you have a T1 line, disable channel 23. If you have an E1 line, disable channel 16.

To disable a channel for ISDN:

1. Start the Administrator.
2. Click **Connectors** in the console tree and double-click the *Telco connector* in the details pane.
3. Click the **Channels** tab.
4. Look in the Channel column on the Channels tab and locate the appropriate channel—number 23 for a T1 line or number 16 for an E1 line.
5. Clear the **Enable** option next to the channel.
6. Click **OK** to save your changes to the Telco connector.

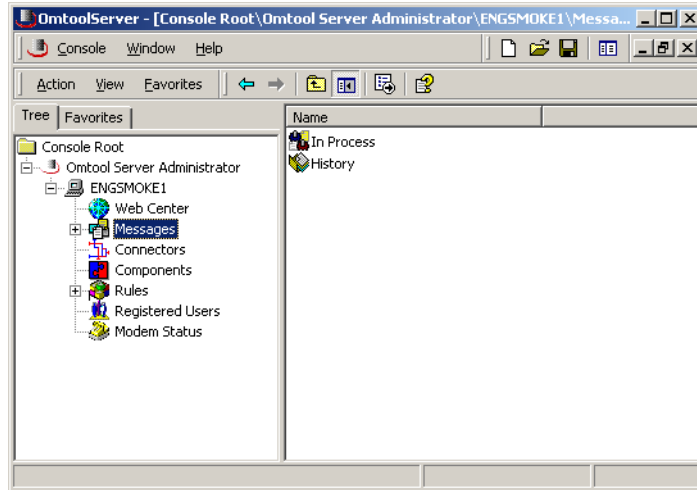
Note: If you are using more than one fax board with your server, you must repeat this procedure for each fax board.

-
5. If you do not disable a channel for ISDN, the channel fails faxes. The journal for a failed fax includes an unclassified miscellaneous error indicating that the transmission was disconnected. Additionally, the Application Log in the Windows Event Viewer indicates error 80004005 with Omttool Modem Manager as the source.

Sending a Quick Fax (for servers with faxing capability)

To send a Quick Fax from the server:

1. Expand the items in the console tree so that the *Messages* folder is visible.



2. Right-click **Messages** in the console tree and select **New > Quick Fax**.

The *Quick Fax* dialog box appears.

3. Complete the *Recipient* section:

- a. Type the destination fax number in the *Fax* text box. (The fax number must be a valid fax destination that you can use to confirm delivery.)
- b. Type the recipient's name and company name in the *Name* and *Company* text boxes, and type a comment for the recipient in the *Comment* text box. (These fields are optional. They appear on the cover page if you include one. Additionally, the server saves this information with the fax in the message database.)

4. Complete the *Sender* section:

- a. Type your fax number in the *Fax* text box, your name in the *Name* text box, and your company name in the *Company* text box. (These fields are optional. They appear on the cover page if you include one. Additionally, the server saves this information with the fax in the message database.)

- b. Type your e-mail address in the *e-Mail* text box. (This field is required. Use a valid e-mail address where the server can send a delivery confirmation message.)
5. Click **Add** in the *Attachments* section and select an attachment for the fax. (Select a word processing document with minimal graphical content. The purpose of a Quick Fax is to make sure that your server can send faxes. Documents with graphical content can take longer to compose on the server.)

Note: This step is optional. However, your Quick Fax must include a cover page, an attachment, or both.

6. Verify that `OmtoolCoverPage` appears in the *Coverpage* text box if you want to include a cover page, or clear the *Coverpage* text box if you do not want to include a cover page.
7. Choose the type of notification you want to receive. (The delivery confirmation message will be sent to the e-mail address you provided in the *Sender* section.) Choose either or both of the following options:
 - **On Success** - Select this option if you want to receive a notification message from the server when your fax has been delivered.
 - **On Failure** - Select this option if you want to receive a notification message from the server if your fax cannot be delivered.
8. Click **Deliver** to send the fax.

Tracking the results of the Quick Fax

There are two ways you can track the Quick Fax:

- **Wait for a notification message when the server has finished processing your fax.**

The notification message will be delivered to the e-mail address you specified when you sent your Quick Fax. Depending on how you configured your notification options, you might receive an e-mail message when the fax has been delivered and/or when the fax cannot be delivered.

Check the appropriate e-mail account for a notification message from the server. The sender of this message might be "FaxServer" or another name you identified as the originator of notification messages.

- **Check the fax machine where you sent the Quick Fax.**

Go to the fax machine where your fax will be delivered. If the fax does not arrive, troubleshoot the fax on the server. Refer to the Administrator help: <http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm>

Chapter 5: Optional configurations

In this chapter...

- "Configuring inbound lookups for mail connectors" on page 66
- "Setting up notifications with mail connectors" on page 71
- "Configuring default user permissions" on page 72
- "Customizing the Web Client" on page 74
- "Customizing the fax header" on page 76
- "Associating a real e-mail account with e-mail messages from the server" on page 78
- "Working with the Telco connector, dialing rules, and access codes" on page 79
- "Configuring Xerox MFDs and XeroxScan connectors" on page 80
- "Configuring the server to support network accounting applications (for servers with a XeroxScan connector)" on page 90
- "Setting up batch scanning for network scan devices" on page 92
- "Printing delivery confirmation messages on the Xerox source device" on page 97
- "Publishing Outlook forms (for servers with an Exchange connector)" on page 99
- "Running the Notes setup and configuring the Notes connector" on page 103
- "Setting up After Hours for inbound faxes" on page 108

Configuring inbound lookups for mail connectors

If your server has an Exchange, Notes, or SMTP connector and your company uses DID or DTMF, configure lookup for the connector so that it can query your lookup server and determine the correct recipients for inbound faxes. (The connector queries your lookup server based on DID extensions or DTMF tones that the receiving channel captures during the transmission of an inbound fax.) Configuring lookup is essential if your company uses DID or DTMF.

Note: If you have an SMTP connector and you want to configure LDAP lookups for a GroupWise environment, go to "Configuring inbound lookup for the SMTP connector in a GroupWise environment" on page 68.

To configure lookup for inbound faxes:

1. Start the Administrator.
2. Click **Connectors** in the console tree and double-click the *Exchange connector*, *Notes connector*, or *SMTP connector* in the details pane.
3. Select the **Enable DID/DTMF Lookup via this connector** option and click the **DID/DTMF lookup** tab.
4. Click the **Add** button.
5. Complete the *General* section:
 - a. Type the name of the lookup server in the *Server Address* text box, type the port number of the lookup server in the *Port* text box, and type a description for this search base in the *Description* text box. The port number can be 389 (LDAP), 636 (secure LDAP), or 3268 (Active Directory)¹.

1. You must use port 389 if you have an Active Directory environment and assign profiles to users.

- b. Complete the *Logon* section. If you want to log on to the lookup server as a specific user, click on the **User** option, type the name of the user in the *User name* text box, and type the password for this user in the *Password* text box. Otherwise, use the default setting *Anonymous*.

Note: Active Directory does not support anonymous lookups.

- c. Click the **Search** tab and complete the *General* section. Type the number of minutes you want the server to time out in the *Search Timeout* text box, and type the search base string in the *Search Base* text box. (Use LDAP format when you type the search base string. For example:
`ou=mysite,o=org.com`)

Note: The timeout setting on your lookup server should be longer than the Search Timeout setting for the connector.

Tip: Consider the scope of your search base when you configure the Search Timeout setting. (For example, when the search base is broad, you should configure a longer Search Timeout setting since the lookup might take a relatively longer amount of time.)

6. Complete the *Search Filter* section.

If you want to use a simple filter, do the following:

- a. Select the **Use simple filter** option.
- b. Select the **Wildcard match ending on received DID/DTMF** option if you want the search filter to match all received DID or DTMF numbers, or select the **Match last [] digits of received DID/DTMF** option and type a number in the spin box if you want the search filter to match only the specified number of digits at the end of the DID or DTMF string.
- c. Select the **Return people only** option if you want the query to return only users associated with this connector. (This option will exclude printers, computers, and other resources from the search results.)

- d. Select an option from the *Attribute holding fax number* drop-down list. The option you select is the field in the database where the connector will look for matches.

If you want to use a custom filter, do the following:

- a. Select the **Use custom filter** option.
 - b. Click the **Properties** button.
 - c. Type the custom search filter in the *Filter* text box. (Use the guidelines provided in the *Custom LDAP Filter* screen.)
 - d. Click **OK**.
5. Complete the *Filter* section:
 - a. Click the **Test** button.
 - b. Type a DID or DTMF number in the text box and click **Search**. The query results will appear below.
 6. Click **Close**.
 7. Click **OK** to save your search base.
 8. Click **OK** to save your changes to the connector.

Configuring inbound lookup for the SMTP connector in a GroupWise environment

The SMTP connector can perform lookups on a Novell server using port 389 or 636 (secure lookup). In a GroupWise environment, the lookup queries the *Fax number* field associated with a user record to determine the recipient for an inbound fax.

To configure lookup for the SMTP connector in a GroupWise environment:

- I. Go to the Novell server, open a command prompt, and load Novell LDAP. (Type `load nldap` and press **ENTER**.)

Note: You must load Novell LDAP before loading GroupWise LDAP. If GroupWise LDAP has already been loaded, an error occurs. In this instance, unload GroupWise LDAP and start again.

This command returns details on Novell LDAP. Make a note of the

organization. For example, if the command returns
"CN=Administrator.O=CompanyName", then **Company Name** is the name
of the organization.

2. Start the Administrator for your AccuRoute or Genifax server.
3. Click **Connectors** in the console tree and double-click the *SMTP connector* in the details pane.
4. Select the **Enable DID/DTMF Lookup via this connector** option and click the **DID/DTMF lookup** tab.
5. Click the **Add** button.
6. Complete the *General* section:
 - a. Type the IP address of the lookup server in the *Server Address* text box, type the port number of the lookup server in the *Port* text box (389 for LDAP or 636 for secure LDAP), and type a description for this search base in the *Description* text box.
 - b. Complete the *Logon* section. If you want to log on to the lookup server as a specific user, click on the **User** option, type the name of the user in the *User name* text box, and type the password for this user in the *Password* text box. Otherwise, use the default setting *Anonymous*.
 - c. Click the **Search** tab and complete the *General* section. Type the number of minutes you want the server to time out in the *Search Timeout* text box, and type the organization name in the *Search Base* text box.

Note: The timeout setting on your lookup server should be longer than the *Search Timeout* setting for the connector.

Tip: Consider the scope of your search base when you configure the *Search Timeout* setting. (For example, when the search base is broad, you should configure a longer *Search Timeout* setting since the lookup might take a relatively longer amount of time.)



7. Complete the *Search Filter* section:
 - a. Select the **Use custom filter** option and click the **Properties** button.
 - b. Locate the search filter in the *Filter* text box. Replace **%* with **####** so that the search filter is:

```
( & ( objectclass=person ) ( facsimileTelephoneNumber=#### ) )
```
 - c. Click **OK**.
8. Complete the *Filter* section:
 - a. Click the **Test** button.
 - b. Type a DID extension or DTMF number in the text box and click **Search**. The query results will appear below.
9. Click **Close**.
10. Click **OK** to save your search base.
11. Click **OK** to save your changes to the connector.

Setting up notifications with mail connectors

If your AccuRoute or Genifax server has an Exchange connector, Notes connector, or SMTP connector, complete the following procedure so that senders can receive notification messages from the server.

To configure the server to deliver notification messages to the sender:

1. Start the Administrator.
2. Click **Connectors** in the console tree and double-click the *Exchange connector*, *Notes connector*, or *SMTP connector* in the details pane. The SMTP connector properties appear.
3. Click the **Genifax** button in the *Manage Connector Profile* section. The connector profile properties appear.
4. Click the **Additional Notification** tab and select the **Override server's profile settings** option.
5. Click the **Add** button. The *Add Recipient* dialog box appears.
6. Select **E-mail** in the drop-down list and type **%ORIGINATOR%** in the text box.
7. Select the **Always send notification** option if you want the sender to receive notifications on success and on failure, or select the **Only on Success** option if you want the sender to receive notifications only on success, or select the **Only on Failure** option if you want the sender to receive notifications only on failure.
8. Select the **Include attachments** option if you want the notification message to include the outbound document if it was composed successfully.
9. Click **OK** to save the recipient.
10. Click **OK** to save your changes to the connector profile.
11. Click **OK** to save your changes to the connector.

Configuring default user permissions

The permissions associated with the default user apply to all users who do not have special permissions assigned to them via Registered Users. Complete the following procedure to configure the permissions for users.

To configure default user permissions:

1. Start the Administrator.
2. Right-click **Registered Users** and select **User Defaults**.
3. Configure default user permissions for the AccuRoute Client (AccuRoute servers only):
 - a. Click the **AccuRoute** tab.
 - b. Select the **Enable use of the AccuRoute client** option if you want to allow users to run the AccuRoute Client.
 - c. Select all the options you want to make available to AccuRoute Client users in the scroll list.
 - d. Select the **Allow viewing of all Embedded Directives** option if you want to allow users to view all the embedded directives created by all AccuRoute Client users.
 - e. Select the **Validate/Lookup via** option if you want your company's document management system or document repository to validate the billing information provided by users, and then select an item from the drop-down list.
4. Configure default user permissions for approval (Genifax servers only):
 - a. Select the **Enabled** option in the *Approval of this user's faxes* section if you want to enable approval or review.
 - b. Select the **Optional as specified by user** option if you want approval or review to be optional or the **Required on all messages** option if you want approval or review to be mandatory for all outbound faxes.

- c. Click the check box next to the approval managers that can approve or review faxes. (Before an approval manager appears in this list, the user must be a registered user with permissions as an approval manager.)
 - d. If you want the approval managers you selected to receive a notification message from the server when the fax has been evaluated, select the **Send Approval Notification to selected approval managers** option. (This is recommended if you have multiple approval managers selected.)
5. Click the **Web Client** tab, and select the **Allow user to send faxes using the Omtool Web Client** option in the *Options* section if you want to allow users to create and send faxes using the Web Client. (Skip this step if your company does not have a Genifax server.)
 6. Click **OK** to save your changes.

Customizing the Web Client

Displaying the primary SMTP address only (Exchange 2003/2000)

If users in your environment have multiple SMTP addresses, Active Directory defines the primary SMTP address for each user.

For example, if *ABC company* gets purchased by *XYZ company*, then some users might have two e-mail addresses—one with the ABC domain name, and the other with the XYZ domain name. Active Directory defines the primary SMTP address for all users as the address with the XYZ domain name.

By default, the Web Client displays all SMTP addresses associated with each user; however, if you want the Web Client to display only the primary SMTP address for each user, complete the following procedure.

To configure the Web Client to display only the primary SMTP address of each user:

1. Navigate to the `\Omtool\GenifaxWeb` directory on the server and open the `global.asa` file in Notepad.
2. Locate the `Session("ExchangeServerPrimaryOnly")` parameter.
3. Set this parameter equal to `1` if you want the Web Client to display only the items associated with each user's primary SMTP address. (Note that Exchange or Active Directory defines each user's primary SMTP address.)
For example: `Session("ExchangeServerPrimaryOnly") = 1`
4. Save the `global.asa` file and close it.

Changing the file format of faxes in the Web Client

The Web Client displays faxes in PDF format by default. If you want to change the file format of faxes in the Web Client to TIF, complete the following procedures.

Note: If you configure the Web Client to display faxes in TIF format, Web Client users must have an image viewer that displays TIF files.

Setting the file format in the server properties

To set the file format of faxes in the Web Client:

1. Start the Administrator.
2. Right-click the *server name* in the console tree and select **Properties**.
3. Choose a file format from the *Enable Web Client integration for* drop-down menu. Select the **PDF (image)** option if you want the Web Client to display faxes in PDF format or the **TIF (image)** option if you want the Web Client to display faxes in TIF format.
4. Click **OK** to save your changes to the server properties.

Modifying the configuration file for the Web Client

To modify the file format setting in the Web Client configuration file:

1. Navigate to the \Omtool\GenifaxWeb directory on the server.
2. Open the global.asa file using Notepad.
3. Locate the following setting: `Session("FinalForm")=`
4. Type `PDF` or `G4.TIF` as the file format you want the Web Client to display. Do not use any spaces.
5. When you complete this step, the file format setting will look like one of the following: `Session("FinalForm")="G4.TIF"` or `Session("FinalForm")="PDF"`
6. Save the Global.asa file and close it.

Note: This change affects only new faxes in the Web Client.

Customizing the fax header

The fax header appears at the top of each page in an outbound fax. The Telco connector has been configured with a default fax header; however, you can customize the fax header for your company.

Companies subject to FCC² regulations must follow the guidelines outlined in the Telephone Consumer Protection Act of 1991, 68.318(d): “It shall be unlawful for any person within the United States to use a computer or other electronic device to send any message via a telephone facsimile machine unless such message clearly contains, in a margin at the top or bottom of each transmitted page or on the first page of the transmission, the date and time it is sent and an identification of the business, other entity, or individual sending the message and the telephone number of the sending machine or of such business, other entity, or individual. Telephone facsimile machines manufactured on and after December 20, 1992, must clearly mark such identifying information on each transmitted message.”

To customize the fax header for the Telco connector:

1. Start the Administrator.
2. Right-click the *Telco connector* and select **Properties**.
3. Click the **Top Line** tab.
4. Type the format you want to use for the fax header in the *Top Line Format* text box. Follow the guidelines for editing the fax header:
 - Use a caret (^) to denote the beginning and end of each top line variable in the fax header. For example: ^DATE^
 - Use a caret (^) to denote the beginning and end of each cover page variable in the top line data string. A cover page variable like %RECIP_NAME% should be entered as ^RECIP_NAME^.
 - Use a plus sign (+) to denote a fixed space in the top line data string. A fixed space occupies the width of one character. Use consecutive plus signs to create larger spaces. For example, if you want to display the date and time with exactly one character space separating them, use ^DATE^+^TIME^.

2. The Federal Communications Commission, an independent government agency in the United States, regulates interstate and international communications by radio, television, wire, satellite and cable.

- Type a space in the top line data string to create a space that is adjusted automatically based on the width of the top line. For example, if you want to display the date and time with adjusted spacing between them, use `^DATE^ ^TIME^`.
 - Type additional text that you want to appear as static text in the fax header. For example, if you want to label the recipient name in the top line, you might use `To: ^RECIP_NAME^`.
5. Click **Preview** to view the top line as it would appear in a fax, and then click **Dismiss** to close the preview window.
 6. Click **OK** to save your changes to the connector.

Associating a real e-mail account with e-mail messages from the server

The server routinely generates and sends notification messages and delivery confirmation messages to users. You can associate a real e-mail account with these e-mail messages. When the server uses a friendly name and an e-mail address to send e-mail messages, users can easily identify e-mail messages from the server and reply to these messages if they require assistance from a network administrator.

To associate a real e-mail account with e-mail messages from the server:

1. Start the Administrator.
2. Click **Components** in the console tree and double-click the **Notification component** in the details pane.
3. Click the **Originator** tab.
4. Select the **Override Default Originator for notifications** option if you want to modify the default originator of notification messages, and type the e-mail address and name of the originator in the *Email* and *Name* text boxes.
5. Click **OK** to save your changes to the component.

Working with the Telco connector, dialing rules, and access codes

If your company has any unique dialing conventions or special dialing considerations, review the dialing rules in the Telco connector. Additionally, if your company uses access codes, you need to modify the existing dialing rules so that the dialing string with the access code will be parsed correctly. For more information on the Telco connector, dialing rules, and access codes, consult the Administrator help: <http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm>

Configuring Xerox MFDs and XeroxScan connectors

If your server has a XeroxScan connector, you must configure the Xerox MFD appropriately so that it copies scanned documents to a scan repository³. The XeroxScan connector on the AccuRoute or Genifax server collects documents from the scan repository and the server routes them based on preconfigured routing rules.

The specific configuration required for your server depends on whether your company uses AccuRoute or Genifax. If your company uses AccuRoute and the server has faxing capability, then you can use a combination of the following techniques.

Configuration for AccuRoute servers

Once you have configured the AccuRoute server and the Xerox MFD, a user should be able to send a document from the Xerox MFD. The following steps describe this process:

1. The user creates a routing sheet using the AccuRoute Client.
2. The user takes the routing sheet and a hard-copy document to the Xerox MFD.
3. The user selects an AccuRoute network scanning template on the Xerox MFD and scans the routing sheet and the hard-copy document.
4. The Xerox MFD copies the scanned document and the job information to the scan repository.
5. The XeroxScan connector on the server collects the scanned document from the scan repository.
6. The server routes the scanned document to the Embedded Directive Manager, a component that scans the document and detects the embedded directive.
7. The server processes the document based on the instructions associated with the embedded directive.

3. The scan repository is a shared directory in the default FTP site on the AccuRoute or Genifax server.

To configure the AccuRoute server and the Xerox MFD, complete the procedures in this section:

1. "Step 1: Creating a network scanning template" on page 81
2. "Step 2: Configuring the XeroxScan connector defaults" on page 81
3. "Step 3: Creating a rule for the Embedded Directive Manager" on page 83

Step 1: Creating a network scanning template

Using CentreWare Scan Services or the web-based application for your Xerox MFD, create a network scanning template. (For specific instructions on creating the template, consult the documentation on your Xerox MFD.)

This template should be configured using the following guidelines:

- Document Format=PDF
- Resolution=300X300
- Mode=Normal

The XeroxScan connector does not require any document management fields in the network scanning template.

The following template configurations are known to be problematic, and therefore you should avoid using them:

- Configuration 1: Document Format=TIFF or MTIFF, Resolution=400X400 or greater
- Configuration 2: Document Format=TIFF or MTIFF, Color
- Configuration 3: Document Format=TIFF or MTIFF, Resolution=300X300 or greater, PageSize=11x17
- Configuration 4: Document Format=PDF, Color, Low compression quality

Step 2: Configuring the XeroxScan connector defaults

To configure the XeroxScan connector defaults for scanned documents with routing sheets:

1. Start the Administrator.
2. Click **Connectors** in the console tree and double-click the *XeroxScan connector*.
3. Click the **Defaults** tab.

4. Locate the *Destination* section and type **222876883** in the *Address* text box.
5. Complete the *Originator* section:
 - a. Type an e-mail address for the default originator in the *E-mail* text box. (This address will be used as the sender's e-mail address if the XeroxScan connector cannot associate any other e-mail address with the document sender. Consult the Administrator help (<http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm>) for more information on the XeroxScan connector and notification messages.)
 - b. Select the **Use e-mail of logged in user if available** option and click the **Configure** button.
 - c. Type the computer name or IP address of the lookup server in the *Server* text box, type the port number⁴ for lookup in the *Port* text box, type the user name associated with the lookup account in the *Username* text box, type the password associated with the lookup account in the *Password* text box, and click **OK**.
6. Complete the *Coverpage* section. Select the **Add system-generated cover page to scanned image** option if you want the XeroxScan connector to add a cover page to all scanned images, and then select a cover page from the *Style* drop-down menu.
7. Complete the *Confirmation* section:
 - Select the **Never** option if you do not want the XeroxScan connector to generate delivery confirmation messages for scanned images.
 - Select the **Failure** option if you want the XeroxScan connector to generate delivery confirmation messages only when delivery fails. Then select the **Send to originator's e-mail** option if you want the server to send delivery confirmation messages to the sender's e-mail address, and/or select the **Print on source device** option if you want the server to send delivery confirmation messages to the Xerox MFD where the sender scanned the original document.

Note: If you configure the connector to send delivery confirmation messages to the source device, the Xerox Walk-Up Printing Driver 2.0 must be installed on the AccuRoute server.

4. The port number can be 389 (LDAP), 636 (secure LDAP), or 3268 (Active Directory).

- Select the **Success or Failure** option if you want the XeroxScan connector to generate a delivery confirmation messages for every scanned image when the server finishes processing it. Then select the **Send to originator's e-mail** option if you want the server to send delivery confirmation messages to the sender's e-mail address, and/or select the **Print on source device** option if you want the server to send delivery confirmation messages to the Xerox MFD where the sender scanned the original document.
8. Click **OK** to save your changes to the connector.

Step 3: Creating a rule for the Embedded Directive Manager

To create a rule that identifies documents from the XeroxScan connector and routes them to the Embedded Directive Manager component:

1. Expand *Rules* in the console tree.
2. Right-click **Outbound** and select **New > Rule**. The *Specify the Criteria for this Rule* screen appears.
3. Add the criteria for outbound messages that should match this rule:
 - a. Click **Add**, select **Destination is a Fax Number** and click **Next**.
 - b. Select the **is** option, type **222876883** in the text box, click **Add**, and click **Finish**.
 - c. Click **Next**. The *Specify the Actions to take for this Rule* screen appears.
4. Click **Add**. The *Add Rule Action* screen appears. Select **Route to Embedded Directive Manager** and click **Next**. The *Route to Embedded Directive Manager* screen appears.
5. Select the **Scan document(s) for Embedded Directive** option and click **Finish**. The *Specify the Actions to take for this Rule* screen appears.
6. Click **Next**. The *If any Action(s) fail do the following* screen appears.
7. Add the actions you want to apply to messages that match this rule if any of the primary actions fail (optional), and click **Next**. The *Specify a name for this rule* screen appears.
8. Type a friendly name for the rule in the text box, configure the other options in this screen as desired, and click **Finish**.

The new rule wizard creates the rule and displays all the outbound routing rules. Order the outbound routing rules as desired.

Important! Now that you have configured the Xerox MFD and the AccuRoute server, send a test document from the Xerox MFD. If the server delivers the test document successfully, then you have configured the Xerox MFD and the AccuRoute server correctly.

Configuration for servers with faxing capability

Once you have configured the AccuRoute or Genifax server and the Xerox MFD, a user should be able to send a fax from the Xerox MFD. The following steps describe this process:

1. The user selects a “fax” network scanning template on the Xerox MFD, enters the destination fax number, and scans the hard-copy document.
2. The Xerox MFD copies the scanned document and the job information to the scan repository.
3. The XeroxScan connector on the server collects the scanned document from the scan repository.
4. The server processes and routes the scanned document to the Telco connector which delivers the document to the fax destination.

To configure the server and the Xerox MFD, complete the procedures in this section:

- "Step 1: Creating a network scanning template" on page 85
- "Step 2: Configuring the XeroxScan connector defaults" on page 86

Step 1: Creating a network scanning template

Using CentreWare Scan Services or the web-based application for your Xerox MFD, create a network scanning template. (For specific instructions on creating the template, consult the documentation on your Xerox MFD.)

This template should be configured using the following guidelines:

- Document Format=TIFF
- Resolution=200X200
- Type=Normal
- Color= Black and white

Additionally, add the following document management fields⁵ to the network scanning template:

- **FaxNumber** (The label for this field should prompt the user to provide the destination for the fax. The Xerox MFD populates the Fax Number field in the network scanning template file and sends this file to the scan repository with the scanned document. The XeroxScan connector interprets the data supplied by the user.)
- **EmailAddress** (Omttool recommends that you include this field in the network scanning template if users do not log on to the Xerox MFD. When the user provides an e-mail address, the XeroxScan connector uses this e-mail address to send a delivery confirmation message if required. If you do not include this metadata field in the network scanning template, make sure that the XeroxScan connector can obtain the user's e-mail address from another source. See "More about delivery confirmation messages and the XeroxScan connector" on page 88.)

5. When you add a document management field to a Xerox network scanning template, you must specify the field name and provide a label for the field. (The label becomes the prompt that the user sees on the Xerox LCD panel.) Additionally, you can specify a default value for a metadata field, but this is optional. For more information on creating network scanning templates, refer to the documentation for your Xerox MFD.

Step 2: Configuring the XeroxScan connector defaults

To configure the XeroxScan connector defaults for scanned documents that the server delivers to fax destinations:

1. Start the Administrator.
2. Click **Connectors** in the console tree and double-click the *XeroxScan connector*.
3. Click the **Defaults** tab.
4. Locate the *Destination* section and select an option in the *Format* drop-down menu:
 - **FAX** is the fax number where the document should be sent. All Scanner Format options include FAX.
 - **BILL** represents the billing code that should be associated with the document. You should select an option that includes the billing code only if your company uses a cost recovery application to recover costs associated with sending documents to your company's clients.
 - **ECODE** represents the DID number of the document sender. If the network scanning template contains the metadata field "EmailAddress" and this field is populated, the XeroxScan connector uses this e-mail address to send the delivery confirmation message. However, if the "EmailAddress" is empty, or if the network scanning template does not contain the metadata field "EmailAddress", the XeroxScan connector performs a lookup based on the document sender's ecode and returns the e-mail address of the document sender.

You should select an option that includes the ecode only if the users are not required to log in at the Xerox MFD, or if you are not using a network scanning template that prompts the document sender to provide an e-mail address. (In order for the DID lookup to be successful, users in your company must have DID numbers, and these DID numbers must be available in your company's address book.)

Tip: Remember that a user must provide the destination for the fax in the same data format you select. For example, if you select **FAX*ECODE**, then users must provide the destination fax number and their DID number in the same format: **6038901957*465**

Leave the *Address* text box empty.

5. Complete the *Originator* section:

- a. Type an e-mail address for the default originator in the *E-mail* text box. (This address will be used as the sender's e-mail address if the XeroxScan connector cannot associate any other e-mail address with the document sender. Consult the Administrator help (<http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm>) for more information on the XeroxScan connector and notification messages.)
- b. Select the **Use e-mail of logged in user if available** option and click the **Configure** button.
- c. Type the computer name or IP address of the lookup server in the *Server* text box, type the port number⁶ for lookup in the *Port* text box, type the user name associated with the lookup account in the *Username* text box, type the password associated with the lookup account in the *Password* text box, and click **OK**.

6. Complete the *Coverpage* section. Select the **Add system-generated cover page to scanned image** option if you want the XeroxScan connector to add a cover page to all scanned images, and then select a cover page from the *Style* drop-down menu.

7. Complete the *Confirmation* section:

- Select the **Never** option if you do not want the XeroxScan connector to generate delivery confirmation messages for scanned images.
- Select the **Failure** option if you want the XeroxScan connector to generate delivery confirmation messages only when delivery fails. Then select the **Send to originator's e-mail** option if you want the server to send delivery confirmation messages to the sender's e-mail address, and/or select the **Print on source device** option if you want the server to send delivery confirmation messages to the Xerox MFD where the sender scanned the original document.

Note: If you configure the connector to send delivery confirmation messages to the source device, the Xerox Walk-Up Printing Driver 2.0 must be installed on the AccuRoute server. (See "Setting up batch scanning for network scan devices" on page 92.)

6. The port number can be 389 (LDAP), 636 (secure LDAP), or 3268 (Active Directory).



- Select the **Success or Failure** option if you want the XeroxScan connector to generate a delivery confirmation messages for every scanned image when the server finishes processing it. Then select the **Send to originator's e-mail** option if you want the server to send delivery confirmation messages to the sender's e-mail address, and/or select the **Print on source device** option if you want the server to send delivery confirmation messages to the Xerox MFD where the sender scanned the original document.
8. Click **OK** to save your changes to the connector.

Important! Now that you have configured the server and the Xerox MFD, send a test document from the Xerox MFD. If the server delivers the test document successfully, then you have configured the server and the Xerox MFD correctly.

More about delivery confirmation messages and the XeroxScan connector

If your company has a Genifax server, you or another network administrator can configure the default settings in the XeroxScan connector for delivery confirmation messages. (If your company has an AccuRoute server, the AccuRoute Client user selects a delivery confirmation option when creating a routing sheet. Therefore the defaults in the XeroxScan connector for delivery confirmation messages do not apply.) The XeroxScan connector can send delivery confirmation messages to the document sender and/or to the Xerox MFD where the user scanned the document.

Confirmations to the sender

When you configure the XeroxScan connector properties to send delivery confirmation messages to the sender of a document, the XeroxScan connector obtains the e-mail address of the sender from the first of four sources:

1. If the user selects a network scanning template that contains the metadata field "EmailAddress" and this field is populated, the XeroxScan connector uses this e-mail address to send the delivery confirmation message.

If the user selects a network scanning template that contains the metadata field "EmailAddress" but this field is empty, or if the network scanning template does not contain the metadata field "EmailAddress", the XeroxScan connector uses the next method.

2. If the user was prompted to provide an e-code, which is the user's DID number, the XeroxScan connector uses the e-code to perform a lookup in the DID/DTMF lookup search base that has been configured in the properties of a mail connector such as the SMTP connector, Exchange connector, or Notes connector.

If the lookup is successful, the XeroxScan connector uses this e-mail address to send the delivery confirmation message. If the lookup is not successful, the XeroxScan connector uses the next method.

3. If the user was required to log on to the Xerox MFD, the XeroxScan connector uses the e-mail address associated with the user's logon credentials.

If the user was not required to log on to the Xerox MFD, or if no valid e-mail address is associated with the user's logon credentials, the XeroxScan connector uses the next method.

4. The XeroxScan connector uses the e-mail address that you configured as the default originator in the XeroxScan connector properties to send the delivery confirmation message.

If you have not configured a default originator, or if the default originator's e-mail address is not valid, the XeroxScan connector cannot send a delivery confirmation message.

Confirmations to the source device

When you configure the XeroxScan connector properties to send delivery confirmation messages to the source device, the XeroxScan connector uses the IP address of the Xerox MFD where the user scanned the document and sends the delivery confirmation message to that device. (The Xerox MFD passes its IP address to the XeroxScan connector with the scanned document.)

Note: If you configure the connector to send delivery confirmation messages to the source device, the Xerox Walk-Up Printing Driver 2.0 must be installed on the AccuRoute server. (See "Setting up batch scanning for network scan devices" on page 92.)

Configuring the server to support network accounting applications (for servers with a XeroxScan connector)

If you are using a network accounting application with Xerox MFDs, you must perform the following procedures so that your network accounting application can track documents from your AccuRoute or Genifax server.

To set up networking accounting for your AccuRoute or Genifax server:

1. Add the Xerox WorkCentre Pro or Document Centre as a printer to the AccuRoute or Genifax server. This can be done through a print server or by adding the drivers to the AccuRoute or Genifax server. (The Xerox WorkCentre Pro or Document Centre should be printing to \\OmtoolServerName\PrinterName or \\PrintServerName\PrinterName.)
2. Go to the Xerox WorkCentre Pro or Document Centre and create a user ID and an accounting ID for all print jobs the AccuRoute or Genifax server sends to the Xerox WorkCentre Pro or Document Centre. (For more information, consult the documentation for the Xerox WorkCentre Pro or Document Centre.)
3. Go to the AccuRoute or Genifax server. View the printer properties for the Xerox WorkCentre Pro or Document Centre. Click the **Configuration** tab and click the **Accounting** button. Select the option that enables network accounting, and provide the user ID and accounting ID for the AccuRoute or Genifax server in the default accounting codes section. Save your changes to the printer properties.
4. Enable the AccuRoute or Genifax server to send delivery notification messages to the Xerox WorkCentre Pro or Document Centre:
 - a. Start the Administrator.
 - b. Expand *Rules*.
 - c. Right-click **Outbound** and select **New > Rule**. The *Specify the Criteria for this Rule* screen appears.

- d. Click the **Add** button, select **Destination is a Printer**, click **Next**, type the IP address of the Xerox WorkCentre Pro or Document Centre in the text box (Use this format: `ip:172.16.10.40`), click **Add**, and click **Finish**.
- e. Click **Next**. The *Specify the Actions to take for this Rule* screen appears.
- f. Click **Add**, select **Route to Connector**, and click **Next**. The *Route to Connector* screen appears.
- g. Select **Printer** in the *Route to Connector* drop-down menu, and select the **Destination** option in the bottom section, and add the network path to the Xerox WorkCentre Pro or Document Centre (Use UNC format. For example: `\\PrintServer\PrinterName`), and click **Finish**.
- h. Click **Next**.
- i. Click **Next**.
- j. Click **Finish**.
- k. Click the **Outbound** folder so that all outbound rules appear in the details pane.
- l. Position the new rule so that it is below the default printing rule.

Setting up batch scanning for network scan devices

AccuRoute supports batch scanning, allowing users to run a single scan operation that contains multiple AccuRoute messages. The AccuRoute server separates the batch into its respective AccuRoute messages, while also validating the total number of AccuRoute messages in the batch. Validation is optional, but highly recommended. It is the only way to confirm that the server enumerated the correct number of AccuRoute messages in the batch.

Tip: This section provides you with information on configuring batch scanning functionality for Xerox scan devices that utilize the XeroxScan connector. Other device models can utilize batch scanning with the Filescan connector. For information on configuring batch scanning with the Filescan connector, consult the Omtool Knowledge Base. See technical article K03493.

For batch scanning with Xerox scan devices, the XeroxScan connector is required on the AccuRoute server. (For more information on the XeroxScan connector, contact *Sales and licensing* on page 4.) Additionally, during the batch scanning configuration, you need to create one or more network scanning templates specifically designated for batch scanning. Details on creating network scanning templates are provided in this section.

Batch requirements

A batch can consist of any number of AccuRoute messages, but its pages must be presented in this order:

1. AccuRoute routing sheet
2. Document being routed to the destinations associated with the routing sheet (one page minimum)

Following this concept, a few ground rules apply to the batch:

- The first page of the batch must be a routing sheet.
- The batch cannot contain back-to-back routing sheets. Each routing sheet must be separated by at least one page, even if the separator page is blank.

- A routing sheet cannot be the last page in a batch.

Convey these batch rules to the users who need to use the batch scanning functionality.

Device requirements

The following requirements apply to the device:

- The Xerox device must be configured with a network scanning template that is designated specifically for batch scanning. Details on creating network scanning templates are provided in this section.
- The network scanner must be configured to save the batch as a single TIFF file that contains all the pages in the batch. (While most scanners can save each page in the scan job as a separate TIFF file, this is not a supported configuration with AccuRoute.)

Optional features of the Xerox implementation

When implementing the batch scanning functionality for Xerox devices as described in this section, you can add some optional fields to the network scanning template. These fields result in user prompts on the device; the data that the user enters takes precedence over other data in the XeroxScan connector configuration or in the Embedded Directive configuration.

These user prompts allow the user to specify the following details for the batch:

- **Number of AccuRoute messages in the batch** - Omtool highly recommends that you configure the network scanning template so that it prompts the user at the device to indicate the number of AccuRoute messages, or routing sheets, in the batch.

Note: This is the most effective measure of quality control with batch scanning implementation. If the AccuRoute server cannot validate the number of AccuRoute messages in the batch, the server fails the entire batch and generates a failure notification according to the confirmation settings in the XeroxScan connector configuration.

- **Filename of the AccuRoute message** - At the device, the user can specify the filename of the AccuRoute message that is delivered to recipients and destinations. The filename is evident only when the message

destination is an e-mail address or a DMS application. When this capability is enabled and the user specifies a filename for the batch, the name applies to all AccuRoute messages in the batch, and the value overrides the filename that is specified in the Embedded Directive configuration.

- **Billing code** - At the device, the user can enter a billing code for the batch. When this capability is enabled and the user specifies a billing code for the batch, the billing code applies to all AccuRoute messages in the batch, and the value overrides the billing code that is specified in the Embedded Directive configuration.

The next section, *Required configuration*, includes instructions on adding the corresponding metadata fields, or document management fields, to the network scanning template.

Required configuration

The XeroxScan connector accepts batches from Xerox scanning devices only when this functionality is presented to the user via a network scanning template.

To set up a network scanning template for batch scanning with AccuRoute:

1. Create a new network scanning template for AccuRoute. Consult the Omttool Server Administrator help for specific guidelines on creating a template for AccuRoute: http://www.omttool.com/documentation/omttoolserver/v331/admin/connectors/XeroxScan/gfsendxoxAbout_Templates_for_the_Xerox_Connector.htm
2. Verify that the intermediate folder where the XeroxScan connector picks up outbound messages is defined in the XeroxScan connector configuration.
3. Add the required metadata field for batch scanning. The required metadata field, *prAccuRouteBatchScan*, enables the user to indicate that the scan job is a batch scan. Add this field to the template with the following configuration:

Field name: `prAccuRouteBatchScan`

Display name: <not displayed>

User editable: No

Default value: 1

This metadata field does not result in a user prompt. When the user selects this network scanning template, the XeroxScan connector accepts the scan job as a batch scan.

Note: The field names listed in the procedure are case-sensitive.

4. Add the optional metadata field, *prAccuRouteBatchCount*, if you want the AccuRoute server to validate the number of AccuRoute messages in the batch. Add this field to the template with the following configuration:

Field name: `prAccuRouteBatchCount`
 Display name: Batch Count
 User editable: Yes
 Default value: <blank>

This metadata field results in a user prompt. The user must enter the number of AccuRoute messages, or routing sheets, in the batch scan so that the AccuRoute server can validate the number of individual AccuRoute messages in the batch scan. If the AccuRoute server cannot validate the number of AccuRoute messages in the batch scan, the entire batch scan fails. The AccuRoute server generates the failure notification and sends it according to the confirmation settings configured in the XeroxScan connector.

5. Add the optional metadata field, *override prDeliveredDocumentName*, if you want to allow the device user to specify the filename of all AccuRoute messages in the batch. (When this user prompt is configured, the value provided by the user overrides the value specified in the network scanning template and the value associated with any individual Embedded Directive in the batch.) Add this field to the template with the following configuration:

Field name: `override prDeliveredDocumentName`
 Display name: [Choose a descriptive phrase that prompts the user to enter the desired filename for the AccuRoute messages in the batch.]
 User editable: Yes
 Default value: <desired filename that should populate this field by default>

This metadata field results in a user prompt. The user can change the default filename for the AccuRoute messages in the batch, or accept the filename that populates this field by default.

6. Add the optional metadata field, *override prBillingCode*, if you want to allow the device user to specify the billing code for all AccuRoute messages in the batch. (When this user prompt is configured, the value provided by the user overrides the value specified in the network scanning template and the value associated with any individual Embedded Directive in the batch.) Add this field to the template with the following configuration:

Field name: `override prBillingCode`
 Display name: [Choose a descriptive phrase that prompts the user to enter



the desired billing code for the AccuRoute messages in the batch.]

User editable: Yes

Default value: <desired billing code, if applicable, that should populate this field by default>

This metadata field results in a user prompt. The user can change the default billing code for the AccuRoute messages in the batch, or accept the value that populates this field by default.

7. Save the network scanning template.

Printing delivery confirmation messages on the Xerox source device

The AccuRoute server can send delivery confirmation messages to the Xerox device where an AccuRoute message originated. This functionality requires the Xerox Walk-Up Printing Driver.

This section includes instructions on installing the driver, modifying the OmtoolPS printer so that it uses this driver, and modifying the XeroxScan connector configuration so that delivery confirmations are sent to the source device. All three procedures are required for this functionality to work correctly.

Installing the Xerox Walk-Up Printing Driver 2.0

To install the Xerox Walk-Up Printing Driver 2.0:

1. Log onto the AccuRoute server, navigate to ...Tools\Xerox Walk-Up Printing Driver, and double-click **Xerox_Walk-Up_Print_Driver.exe**. The *Welcome to the Xerox Walk-Up Printing Driver 2.0 Installation Wizard* screen appears.
2. Click **Next**. The *License Agreement* screen appears.
3. Read the license agreement, select the **I accept the license agreement** option, and click **Install** if you agree to the terms. The setup program installs the Xerox Walk-Up Printing Driver 2.0.
4. Click **Finish** to complete the installation.

Configuring the OmtoolPS driver to use the Xerox Walk-Up Printing Driver 2.0

Modify the properties of the OmtoolPS printer so that it uses the driver *Xerox Walk-Up Printing Driver*. (This driver should automatically appear in the list of available drivers for the OmtoolPS printer.) Then continue to the next section.

Configuring the AccuRoute server to send delivery confirmations to the source device

To configure the AccuRoute server to send deliver confirmation messages to the source device:

1. Start the Administrator.
2. Click **Connectors** in the console tree and double-click the *XeroxScan connector*.
3. Click the **Defaults** tab. (The Defaults tab contains the settings that determines the default behavior at the connector level. If you want to configure this behavior for a particular folder, you must locate the desired folder, override the connector defaults, and then perform a similar configuration. For more information, consult the Administrator help.)
4. Locate the *Confirmation* section and do one of the following:
 - Select the **Never** option if you do not want the XeroxScan connector to generate delivery confirmation messages for scanned images.
 - Select the **Failure** option if you want the XeroxScan connector to generate delivery confirmation messages only when delivery fails. Then select the **Print on source device** option.
 - Select the **Success or Failure** option if you want the XeroxScan connector to generate a delivery confirmation messages for every scanned image when the server finishes processing it. Then select the **Print on source device** option.
5. Click **OK** to save your changes to the connector.

You have completed the required configuration that enables the AccuRoute server to send delivery confirmation messages to the Xerox device where the AccuRoute message originated.⁷

7. If delivery confirmation messages do not print on the source device, consult technical article K03132 in the knowledge base.

Publishing Outlook forms (for servers with an Exchange connector)

The Forms Publisher is an application that publishes the Outlook forms which enable Outlook users to send and receive faxes.

Note: The Genifax Send form has special fax options that are not available in the Outlook New Message form.

Requirements for installing the Forms Publisher

The system where you install the Forms Publisher application must meet the following minimum requirements:

- Windows® XP Professional/2000 with SP3 or later
- Outlook 2003/2002/2000
- user account with owner permissions to the Organizational Forms Library

Important! Do not install the Forms Publisher on the AccuRoute or Genifax server or the Exchange Server.

Installing the Forms Publisher

Depending on the Genifax Desktop edition you have⁸, choose one of the following methods of installing the Forms Publisher:

- "Standard edition" on page 100
- "Legal edition" on page 100

8. The standard edition does not have any special notation in the product name; however, the legal edition contains "LE" in the product name. (Genifax LE Desktop)

Standard edition

Using the following procedure, you will install the Forms Publisher. This procedure applies to the standard edition of Genifax.

To install the Forms Publisher:

1. Log on to the system where you will install the Forms Publisher.
2. Insert the installation CD into the CD-ROM drive.
3. Navigate to the \Clients\FormsPublisher\ directory.
4. Double-click **setup.exe**. The InstallShield Wizard launches and displays the *Welcome* screen.
5. Click **Next**. The *License Agreement* screen appears.
6. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.
7. Click **Next** to accept the default destination location. (If you want to change the destination location, click **Browse**, navigate to the directory where you want to install the Forms Publisher, click **OK**, and click **Next**.) The *Start Copying Files* screen appears.
8. Review the installation settings and click **Next** to begin installing the Forms Publisher. The *InstallShield Wizard Complete* screen appears.
9. Click **Finish** to complete the installation.

Now that you have installed the Forms Publisher, you can launch the application and publish the forms. (See "Publishing the forms" on page 101.)

Legal edition

Using the following procedure, you will install the Forms Publisher. This procedure applies to the legal edition of the Genifax.

To install the Forms Publisher:

1. Log on to the system where you will install the Forms Publisher.
2. Insert the installation CD into the CD-ROM drive.
3. Click the **Start** button and select **Programs > Accessories > Command Prompt**. The Command Prompt window appears.

4. Set the directory to the \Clients\FormsPublisher\ directory on the CD.

Tip: For help on changing drives and directories using the command prompt, type `cd/?` and press **ENTER**.

5. Type `setup.exe /z"legal"` and press **ENTER**. The InstallShield Wizard launches and displays the *Welcome* screen.
6. Click **Next**. The *License Agreement* screen appears.
7. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.
8. Click **Next** to accept the default destination location. (If you want to change the destination location, click **Browse**, navigate to the directory where you want to install the Forms Publisher, click **OK**, and click **Next**.) The *Start Copying Files* screen appears.
9. Review the installation settings and click **Next** to begin installing the Forms Publisher. The *InstallShield Wizard Complete* screen appears.
10. Click **Finish** to complete the installation.

Now that you have installed the Forms Publisher, you can launch the applications and publish the forms. Proceed to the next section.

Publishing the forms

Using the following procedure, you will launch the Forms Publisher and publish the forms.

To publish the forms:

1. Click the **Start** button and select **Programs > Omtool Utilities > Forms Publisher**. The Forms Publisher starts.
2. Select all the forms in the Forms Publisher window and click the **Publish** button.

Tip: You can select multiple forms by pressing and holding the **CTRL** key and clicking on the forms you want to select. You can select a group of forms by clicking on the first item, pressing and holding the **SHIFT** key, and selecting the last item.

Note: After you click the **Publish** button, a **Warning** dialog box might appear. Each time this dialog box appears, click the **Enable Macros** button or the **Disable Macros** button. Since the forms do not utilize macros, the button you click does not have an impact on the functionality of the forms.

The *Outlook Options* dialog box appears.

3. Select the **Local Profiles** option or the **Public Profiles** option. If you select the **Public Profiles** option, click the **Browse** button, navigate to the root folder where public folder profiles are stored, and click **OK**.

Click **OK** on the *Outlook Options* dialog box. The *Forms Publisher* dialog box displays the status of the forms you have published.

4. Click **File** and select **Exit** to quit the application.

You have finished publishing the forms. If desired, you can uninstall the Forms Publisher using Add/Remove Programs. For more information on using Add/Remove Programs, consult Windows help.

Tip: The Exchange connector supports several features, including inbound lookup, sender lookup, recipient lookup, and other special options such as connector failover. For information on configuring the Exchange connector, consult the Administrator help: <http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm>

Running the Notes setup and configuring the Notes connector

The Notes connector functions as a gateway between the AccuRoute or Genifax server and a Domino Server 5.x or 6.0/6.5. In order to set up the connector, you must complete a series of steps:

- "Step 1: Registering a new Notes user" on page 103
- "Step 2: Installing the Notes client on the AccuRoute or Genifax server" on page 104
- "Step 3: Adding the Notes installation path to the Genifax system path on the AccuRoute or Genifax server" on page 104
- "Step 4: Modifying the access control list for the default mail template on the Domino server" on page 104
- "Step 5: Running the Genifax Notes setup on the Domino server" on page 105
- "Step 6: Modifying the access control list for the Genifax_Mail.box on the Domino server" on page 106
- "Step 7: Adding the Notes connector to the AccuRoute or Genifax server" on page 107

Step 1: Registering a new Notes user

The Notes connector on the AccuRoute or Genifax server must connect to the Domino server with a user ID that has a blank password.

Go to the Lotus Domino Administrator and register a new user. The first name should be "Omtool" and the last name should be "connector". Add the user to the registration queue. Then log on as the new user using the Switch ID feature. Clear the password associated with this account.

For more information about registering users in the Lotus Domino Administrator, consult the Lotus Domino Administrator help.

Step 2: Installing the Notes client on the AccuRoute or Genifax server

Install the Notes client on the AccuRoute or Genifax server and configure it for the user you created in the previous step. (See "Step 1: Registering a new Notes user" on page 103.) For more information on installing the Notes client, consult the Notes documentation.

Step 3: Adding the Notes installation path to the Genifax system path on the AccuRoute or Genifax server

To add the Notes client installation path to the Genifax system path on the AccuRoute or Genifax server:

1. Log on to the AccuRoute or Genifax server.
2. Right-click **My Computer** and select **Properties**.
3. Click the **Advanced** tab.
4. Click the **Environment Variables** button.
5. Go to the *System variables* section, select **Path** in the *Variable* list, and click **Edit**.
6. Position the cursor at the end of the text in the *Variable Value* text box, and type `;c:\lotus\notes\`.

Note: "`c:\lotus\notes\`" should be the path to the Notes client on the computer where you are working. If you installed the Notes client in a different location, update the path you typed in the text box.

7. Click **OK** on the *Edit System Variable* dialog box, click **OK** on the *Environment Variables* dialog box, and click **OK** on the *System Properties* dialog box.

Step 4: Modifying the access control list for the default mail template on the Domino server

Using the Lotus Domino Administrator client, give your administrator user account *Manager* access permissions to the default mail template. (This allows the Notes setup program for Genifax to modify the default mail template and add fax options.) For more information on modifying the access control list for the default mail template, consult the Lotus Domino Administrator help.

Step 5: Running the Genifax Notes setup on the Domino server

To run the Genifax Notes setup on the Domino server:

1. Log on to the AccuRoute or Genifax server.
2. Navigate to ...\\Omttool\\OmttoolServer\\Clients\\GenifaxNotes and double-click **setup.exe**. The *Welcome* screen appears.

Note: Do not install run the Genifax Notes setup from the installation CD.

3. Click **Next**. The *Customer Information* screen appears.
4. Type your name and company name in the *User Name* and *Company Name* text boxes. Select the **Anyone who uses this computer (all users)** option if you want to install the Notes setup for all users on this computer, or select the **Only for me (omttool)** option if you want to install the Notes setup for the current user. Click **Next**. The *Choose Destination Location* screen appears.
5. Click **Next** to accept the default destination location. (If you want to change the destination location, click **Browse**, navigate to the directory where you want to install the Notes setup, click **OK**, and click **Next**.) The *Domino Server Name* screen appears.
6. The canonical name of the Domino server appears in the *Server* text box. (The setup program detected the name of the Domino server in the *Notes.ini* file.) Verify that the server name is correct and click **Next**. The *Password* screen appears.
7. Type the password associated with your Notes administrator account in the *Password* text box and click **Next**. The *Update mail template* screen appears.
8. Select **Yes** if you want to modify the default mail template and add fax options, or select **No** if you do not want to modify the default mail template. Click **Next**. The *Domino Version* screen appears.

Note: If you select Yes, the setup program creates a backup copy of the default mail template so that it can be restored if you uninstall the Genifax Notes setup or modify the installation later via Add/Remove Programs. If you select No, users can send “one-off” faxes only. One-off faxes, created using the Notes New Memo, form do not support special Genifax features such as secure fax delivery, preview, approval, etc.

9. Select the **5.x** or **6.x** option depending on the version of your Domino server and click **Next**. The *Default Mail Template* screen appears.
10. Based on the Domino server version you selected in the previous step, the setup program supplies the name of the default mail template on the Domino server: `mail50.ntf` for Domino server 5.x or `mail6.ntf` for Domino server 6.x. If the default mail template file on the Domino server is different than the file name that appears in the text box, type the correct file name in the text box. Click **Next**. The *Profile Management* screen appears.
11. Select the **Administrator Managed** option if you want network administrators to create profiles and assign users to them, or select the **User Managed** option if you want user to create and manage their own profiles. Click **Next**. The *Notes Foreign Domain* screen appears.
12. The setup program creates a foreign domain for faxes created by Notes users. The default foreign domain name is `Genifax`. (If you want to change the name of the foreign domain for faxes, type a new name in the text box.)

Note: The fax foreign domain name must be included in one-off faxes.

Click **Next**. The *Start Copying Files* screen appears.

13. Review the installation settings and click **Next**. The *Information* dialog box displays a message indicating that the setup was successful.
14. Click **OK**. The *InstallShield Wizard Complete* screen appears.
15. Click **Finish** to complete the installation and restart the computer.

Step 6: Modifying the access control list for the Genifax_Mail.box on the Domino server

The Notes client on the AccuRoute or Genifax server has been configured for the new Notes user you registered in a previous step. ((See "Step 1: Registering a new Notes user" on page 103.)) Using the Lotus Domino Administrator, give this user *Manager* access permissions to `Genifax_mail.box`. (The Genifax mail box is located on the Domino server.) For more information on modifying the access control list for the Genifax mail box, consult the Lotus Domino Administrator help.

Step 7: Adding the Notes connector to the AccuRoute or Genifax server

To add the Notes connector to the AccuRoute or Genifax server:

1. Start the Administrator on the AccuRoute or Genifax server.
2. Right-click **Connectors** in the console tree and select **New > Notes**.
3. Type the computer name or IP address of the AccuRoute or Genifax server in the *Server Address* text box and click **Next**.
4. Type a friendly name for the connector in the *Name* text box and click **Next**.
5. Type the computer name of the LDAP server in the *LDAP Host Name* text box and click **Next**.
6. Type the lookup search base in the *LDAP Search Base* text box and click **Next**.
7. Click **Finish**.

Setting up After Hours for inbound faxes

“After hours” describes the off-hours in your company. During these hours, your company might operate at a limited capacity or be closed altogether. If you want the server to handle inbound faxes in a particular way, you can create After Hours rules on the server.

When you create After Hours rules, you can indicate when it is “after hours” in your company, allowing the server to regulate the processing of inbound faxes automatically during your company’s off-hours. As an alternative, you can rely on network administrators and FaxCenter users to enable After Hours when they leave the workplace.

Creating an After Hours rule for inbound faxes

To create an After Hours rule for inbound faxes:

1. Start the Administrator.
2. Expand **Rules** in the console tree. Right-click **Inbound** and select **New > Rule**.
3. Create the criteria for this rule, so that the rule applies when it is after hours:
 - If network administrators and FaxCenter users enable After Hours when they leave the workplace: Click **Add**, select **After Hours**, click **Next**, and click **Finish**.)
 - If the server regulates After Hours automatically: Click **Add**, select **Days of Week** or **Time of Day**, and click **Next**. Select the days of the week or the hours when it is after hours at your workplace, and click **Finish**.

Important! An inbound fax must meet all criteria in order to match a rule.

Tip: If you need to set up after hours routing for full days and partial days such as weekends and nights, create multiple rules. The first rule should include the Days of Week criteria (with full days identified) and the second rule should include the Time of Day criteria (with off-hours identified).

4. Click **Next** and choose the routing actions for inbound faxes that match this rule. Click **Add**, select a destination for inbound faxes, click **Next**, configure the routing details, and click **Finish**.
5. Click **Next** and choose failover actions if desired. (The server applies failover actions to an inbound fax only when the primary action fails.)
6. Click **Next** and configure options for this rule. Type a descriptive name such as *After Hours rule* in the text box, keep the **Enable this rule** option enabled if you want the rule the server to apply this rule to inbound faxes immediately, keep the **Stop processing other rules** option enabled if you want the server to stop applying rules to an inbound fax if it matches this rule, and click **Finish**. The server creates the rule and displays it in the details pane.

*Tip: If you want to create another rule similar to this one, right-click the rule in the details pane and select **Make a Copy**. A copy of the rule appears in the list. **Modify it as necessary.***

Enabling and disabling After Hours in the Administrator

You can enable After Hours using the Administrator if an inbound rule on the server uses the *After Hours* criteria. For example, the criteria for the rule should indicate *when it is After Hours*, or *when it is not After Hours*.

To enable or disable After Hours in the Administrator:

Right-click **Rules** and select the **Afterhours** option if you want to enable After Hours, or clear the **Afterhours** option if you want to disable After Hours.

Chapter 6: Installing remote components

In this chapter...

- "Remote Administrator" on page 112
- "Remote Composer" on page 115
- "Remote Modem Server" on page 118

Remote Administrator

The Administrator is the application you use to manage the AccuRoute or Genifax server. You can install this application on computers in the same domain as the server, and in other domains that have a bidirectional trust with the server's domain. (For a complete list of requirements for a remote Administrator, go to "Remote Administrators" on page 10.)

Assigning Distributed COM permissions

Assign Distributed COM permissions on the computer where you plan to install a remote Administrator. (See "Assigning Distributed COM permissions" on page 16.)

Important! Complete this step before you begin installing a remote Administrator.

Adding the server account to the Administrators group

The server account must belong to the Administrators group on the computer where you plan to install a remote Administrator. If necessary, add the server account to the Administrators group. For detailed steps on adding users to groups, consult Windows help.

Installing a remote Administrator

To install the Administrator:

1. Log on to the computer where you want to install a remote Administrator using the server account. (This is the same account you used to install the AccuRoute or Genifax server software.) Then insert the AccuRoute or Genifax installation CD into the CD-ROM drive.
2. Navigate to the \MessageServer directory on the CD, and double-click **setup.exe**. The InstallShield Wizard launches and displays the *Welcome* screen.
3. Click **Next**. The *License Agreement* screen appears.

4. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Customer Information* screen appears.
5. Type your user name in the *User Name* text box, your company name in the *Company Name* text box, and your server license key in the *License Number* text boxes, and click **Next**. The *Choose Destination Location* screen appears.
6. Click **Next** to accept the default destination location. (If you want to change the destination location, click **Browse**, navigate to the directory where you want to install the server software, click **OK**, and click **Next**.) The *Setup Type* screen appears.
7. Select the **Custom** option and click **Next**. The *Select Features* screen appears.
8. Select the **Administrator** option, clear all the other options, and click **Next**. The *Start Copying Files* screen appears.
9. Review the installation settings and click **Next** to begin installing the server options you selected. The InstallShield Wizard installs the server options you selected and displays the *InstallShield Wizard Complete* screen.
10. Click **Finish** to restart your computer.

Now that you have installed the Administrator software, launch the Administrator and connect to one or more servers in the local area network.

Launching the Administrator and connecting to the server

To launch the Administrator and connect to servers in the local area network:

1. Click the **Start** button and select **Programs > Omtool Server > Administrator**. The *Specify Omtool Message Server* dialog box appears.
2. Type the computer name or IP address of the server in the *Network Address* text box and click **Finish**. (If the server software has not been installed yet, click **Cancel**. You can connect to the server later. (See "Connecting to additional servers" on page 114.)

If you have more than one AccuRoute or Genifax server in the local area network, type the name of any server in the *Network Address* text box—you can connect to additional servers once the Administrator starts. (See "Connecting to additional servers" on page 114.)

The Administrator starts.

3. Quit the Administrator.
4. Click **Yes** to save the console settings to OmtoolServer.msc.

Connecting to additional servers

To connect to an AccuRoute or Genifax server.

1. Start the Administrator.
2. Right-click on **Omtool Server Administrator** in the console tree and select **Connect**. The *Specify Omtool Message Server* dialog box appears.
3. Type the computer name or IP address of the server in the *Network Address* text box and click **Finish**. The server appears in the console tree under *Omtool Server Administrator*.

Remote Composer

You can use any combination of local and remote Composers with the server. Having multiple Composers distributes the workload of the Compose component—this is helpful especially if your company sends and receives a large volume of documents and faxes.

Multiple Composers also provide failover support for each other. If a system with a Composer goes offline, the other Composers assume the workload. This does not require any configuration—failover support is built into the Compose component when you have multiple Composers running in your environment.

Assigning Distributed COM permissions

Assign Distributed COM permissions on the computer where you plan to install a remote Composer. (See "Assigning Distributed COM permissions" on page 16.)

Important! Complete this step before you begin installing a remote Composer.

Adding the server account to the Administrators group

The server account must belong to the Administrators group on the computer where you plan to install a remote Composer. If necessary, add the server account to the Administrators group. For detailed steps on adding users to groups, consult Windows help.

Installing a remote Composer

To install a remote Composer:

1. Log on to the computer where you want to install a remote Composer using the server account. (This is the same account you used to install the AccuRoute or Genifax server software.) Then insert the AccuRoute or Genifax installation CD into the CD-ROM drive.

2. Navigate to the \MessageServer directory on the CD, and double-click **setup.exe**. The InstallShield Wizard launches and displays the *Welcome* screen.
3. Click **Next**. The *License Agreement* screen appears.
4. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Customer Information* screen appears.
5. Type your user name in the *User Name* text box, your company name in the *Company Name* text box, and your server license key in the *License Number* text boxes, and click **Next**. The *Choose Destination Location* screen appears.
6. Click **Next** to accept the default destination location. (If you want to change the destination location, click **Browse**, navigate to the directory where you want to install the server software, click **OK**, and click **Next**.) The *Setup Type* screen appears.
7. Select the **Custom** option and click **Next**. The *Select Features* screen appears.
8. Select the **Compose** option, clear all the other options, and click **Next**. The *Omtool Server User* screen appears.
9. Type the logon credentials associated with the user account you have designated for the server. Type the domain in the *NT Domain* text box, the user name in the *User Name* text box, and the password in the *Password* and *Confirm Password* text boxes, and click **Next**. The *Start Copying Files* screen appears.
10. Review the installation settings and click **Next** to begin installing the server options you selected. The InstallShield Wizard installs the server options you selected and displays the *InstallShield Wizard Complete* screen.
11. Click **Finish** to restart your computer.

Now that you have installed the Compose component software on a remote computer, you must add the Composer to the server.

Adding the Composer to the server

Note: This procedure requires a license key for the Composer. If you do not have a license key that will allow you to add the Composer to the server, contact Omtool Sales to purchase one. (See "Sales and licensing" on page 4.)

To add the Composer to the server:

1. Log on to a system where the Administrator is installed.
2. Start the Administrator.
3. Click **Components** in the console tree.
4. Right-click **Compose** in the details pane and select **Properties**.
5. Click the **Composers** tab.
6. Click the **Add** button.
7. Type the computer name or IP address of the remote Composer in the *Server Address* text box. Type the license key for the remote Composer in the *License key* text box.
8. Click **OK** to add the remote Composer to the server. The remote Composer should appear in the list of Composers on the Composers tab.
9. Click **OK** to save your changes to the Compose component.

Now that you have added the remote Composer to the server, it is enabled by default and will begin converting messages for the server.

Tip: You can modify the properties of each Composer. This determines the types of conversions this Composer performs. For more information, refer to the Administrator help: <http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm>

Remote Modem Server

A remote Modem Server sends and receives faxes for the AccuRoute or Genifax server. A Modem Server requires Modem Server software and at least one fax board. For a complete list of requirements for remote Modem Servers, go to "Remote Modem Servers (for servers with faxing capability)" on page 12.

Assigning Distributed COM permissions

Assign Distributed COM permissions on the computer where you plan to install a remote Modem Server. (See "Assigning Distributed COM permissions" on page 16.)

Important! Complete this step before you begin installing a remote Modem Server.

Adding the server account to the Administrators group

The server account must belong to the Administrators group on the computer where you plan to install a remote Modem Server. If necessary, add the server account to the Administrators group. For detailed steps on adding users to groups, consult Windows help.

Installing a remote Modem Server

To install a remote Modem Server:

1. Log on to the computer where you want to install a remote Modem Server using the server account. (This is the same account you used to install the AccuRoute or Genifax server software.) Then insert the AccuRoute or Genifax installation CD into the CD-ROM drive.
2. Navigate to the \MessageServer directory on the CD, and double-click **setup.exe**. The InstallShield Wizard launches and displays the *Welcome* screen.
3. Click **Next**. The *License Agreement* screen appears.

4. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Customer Information* screen appears.
5. Type your user name in the *User Name* text box, your company name in the *Company Name* text box, and your server license key in the *License Number* text boxes, and click **Next**. The *Choose Destination Location* screen appears.
6. Click **Next** to accept the default destination location. (If you want to change the destination location, click **Browse**, navigate to the directory where you want to install the server software, click **OK**, and click **Next**.) The *Setup Type* screen appears.
7. Select the **Custom** option and click **Next**. The *Select Features* screen appears.
8. Select the **Modem Server** option, clear all the other options, and click **Next**. The *Omtool Server User* screen appears.
9. Type the logon credentials associated with the user account you have designated for the server. Type the domain in the *NT Domain* text box, the user name in the *User Name* text box, and the password in the *Password* and *Confirm Password* text boxes, and click **Next**. The *Start Copying Files* screen appears.
10. Review the installation settings and click **Next** to begin installing the server options you selected. The InstallShield Wizard installs the server options you selected and displays the *InstallShield Wizard Complete* screen.
11. Click **Finish** to restart your computer.

Before the remote Modem Server can send and receive faxes for the server, you must detect the fax board channels using the Administrator. Proceed to the next section.

Detecting the fax board channels on the remote Modem Server

To detect the fax board channels on the remote Modem Server:

1. Start the Administrator.
2. Click **Connectors** in the console tree.
3. Right-click the *Telco connector* in the details pane and select **Properties**.
4. Click the **Channels** tab.
5. Click the **Detect Channels** button.

6. Type the computer name or IP address of the remote Modem Server in the *Server Address* text box and click **Next**.

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

Now that you have detected the channels on the remote Modem Server, it will begin sending and/or receiving faxes for the server.

Chapter 7: Clustering

In this chapter...

- "Introduction to clustering" on page 122
- "Requirements" on page 126
- "Setting up the servers in the cluster" on page 130
- "Creating the cluster" on page 134
- "Simulating a failure" on page 135

Introduction to clustering

Clustering, an advanced feature of AccuRoute and Genifax, ensures that your company experiences no down time when a failure causes a server to go offline.

A cluster includes at least three servers:

- *Primary server*: Assumes the workload under normal conditions.
- *Secondary server*: Assumes the workload while the primary server is offline.
- *Database server*: Store databases, server configuration files, and Telco share¹.

Note: This database server can also be a remote Administrator², Composer³, and/or Modem Server⁴.

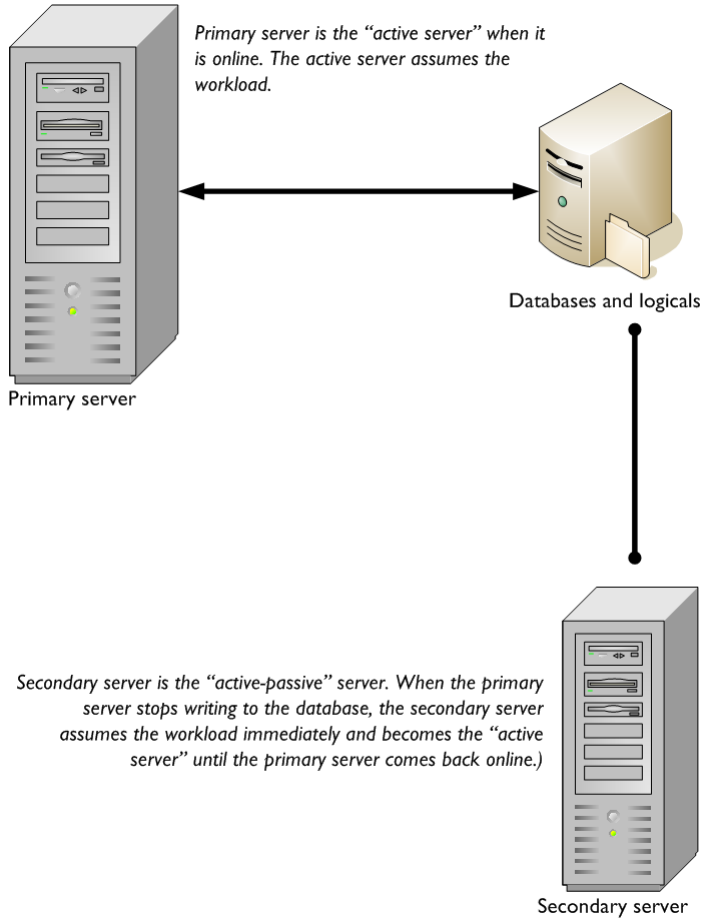
Because the databases, server configuration files, and Telco share reside on the database server, both the primary server and the secondary server can access them readily.

The “watchdog” of the cluster is the Cluster Manager service, a Windows service that runs on both servers and monitors a table in the message database that resides on the database server. When the primary server stops writing to the table, the secondary server starts its Omtool services and assumes the workload until the primary server comes back online.

-
1. The Telco share is a shared directory for inbound and outbound faxes. After receiving an inbound fax, a Modem Server copies the fax to the Telco share directory so that the Telco connector on the AccuRoute or Genifax server can collect it. Conversely, after the AccuRoute or Genifax server processes an outbound fax, the Telco connector copies the fax to the Telco share directory so that the Modem Server can collect and deliver it.
 2. Refers to the Administrator (the application you use to manage the AccuRoute or Genifax server) when it is installed on a remote computer.
 3. A composer associated with the AccuRoute or Genifax server that resides on a remote computer. Whether your AccuRoute or Genifax server utilizes one composer or multiple composers, a composer can reside on the database server in a cluster.
 4. A Modem Server associated with the AccuRoute or Genifax server that resides on a remote computer. Whether your AccuRoute or Genifax server utilized one Modem Server or multiple Modem Servers, a Modem Server can reside on the database server in a cluster.

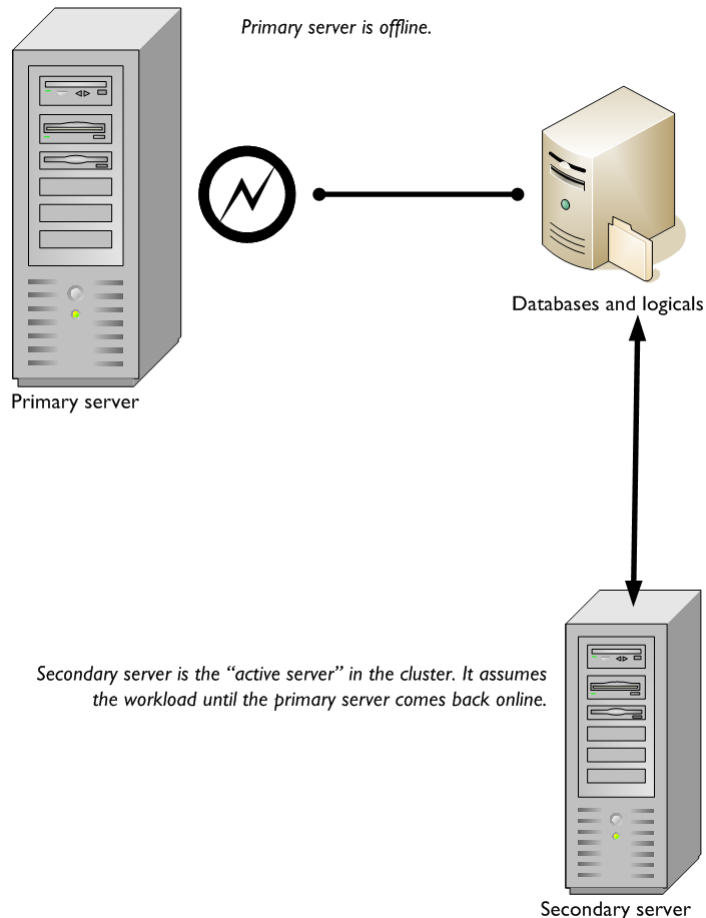
Primary server active

Under normal conditions, the primary server is the “active” server in the cluster. It assumes the workload, runs all the Omtool services, and constantly writes to the databases on the database server.



Primary server offline

When the primary server goes offline for more than 45 seconds, the Cluster Manager starts the Omtool services on the secondary server, allowing the secondary server to assume the workload. The transition occurs immediately, restricting any potential down-time to approximately 1 to 5 minutes.



The secondary server handles the workload until the primary server comes back online. The Cluster Manager, continually monitoring the databases that reside on the database server, instantly detects when the primary server has been restored and starts the Omtool services on the primary server. Now the primary server assumes the workload again and becomes the active server in the cluster.

The Cluster Manager facilitates the workload transition between the primary server and the secondary server. Transitions are immediate and automatic, requiring no manual intervention.

Monitoring the primary server

When the secondary server becomes the active server in the cluster, you must restore the primary server before it can assume the workload again. There are three ways you can learn about a failure on the primary server:

- A dialog box appears in the Administrator and instructs you to close the Administrator. This RPC error occurs in any instance of the Administrator. After quitting the Administrator, you can start the Administrator again.
- The Application Event Viewer on the primary server logs an error.
- A third-party monitoring application, if configured for your AccuRoute or Genifax server, can monitor the server and detect the error.

Requirements

Primary and secondary servers

The primary and secondary servers must meet the minimum requirements for AccuRoute and Genifax servers. (See "AccuRoute and Genifax servers" on page 8.)

Note: Clustering is a licensed feature. You should have a unique license key for each server.

Database server

The database server must meet the minimum requirements for AccuRoute and Genifax servers. (See "AccuRoute and Genifax servers" on page 8.)

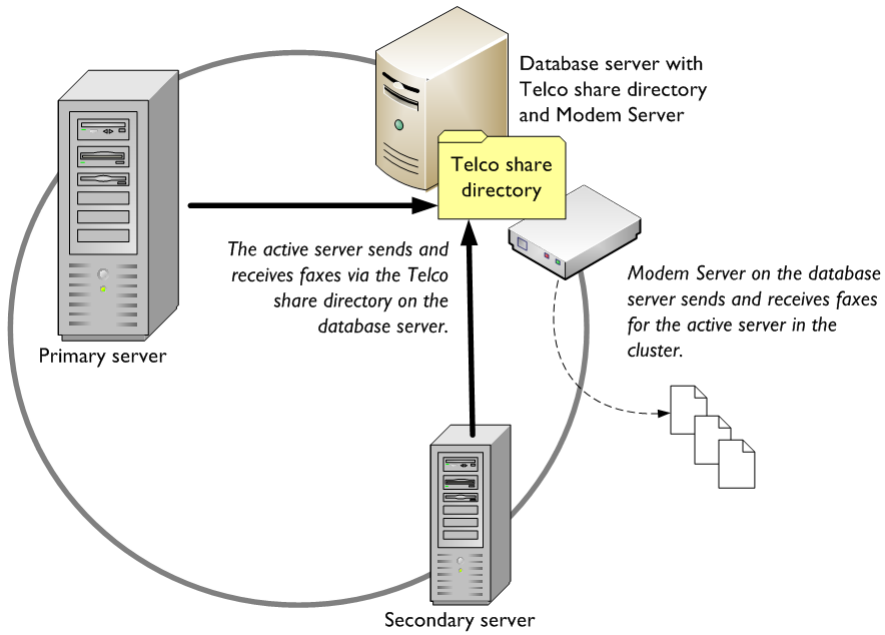
Additionally, SQL Server 2000 must be installed on the database server. *Microsoft SQL Server 2000 Desktop Engine (MSDE)* does not satisfy this requirement.

Supported Modem Server configurations

You can set up a cluster with one, two, or three Modem Servers. See "One Modem Server" on page 127, "Two Modem Servers" on page 128, and "Three Modem Servers" on page 129.

One Modem Server

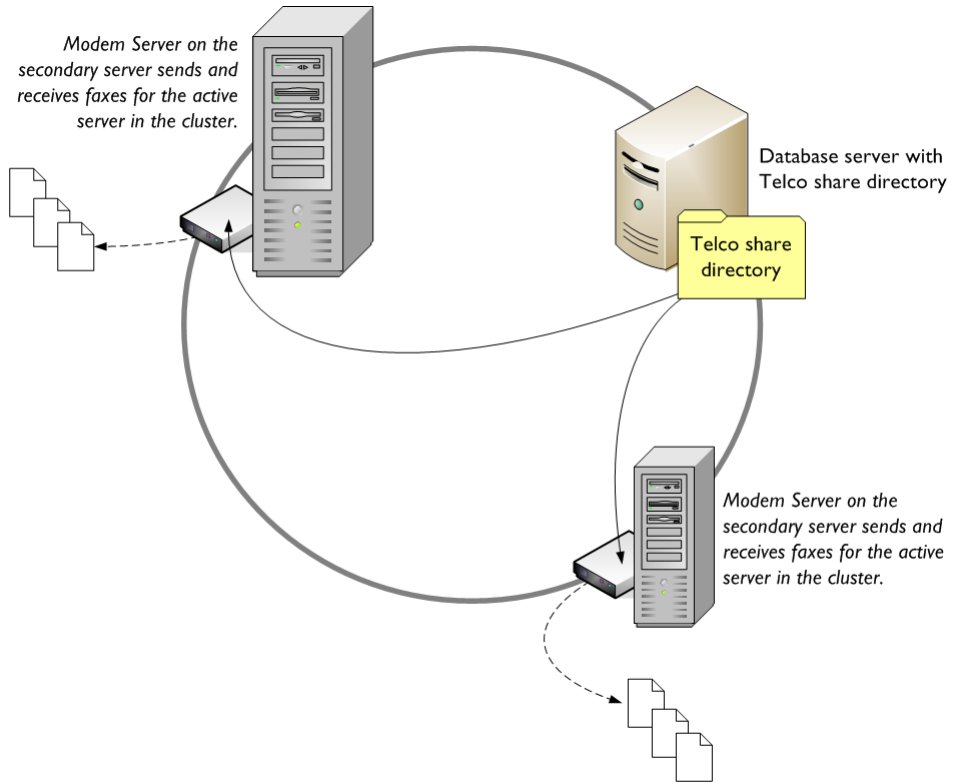
When the Modem Server resides on the database server, the Modem Server sends and receives faxes for the active server in the cluster.



This configuration requires at least one fax board. (You can install multiple fax boards on the database server if the computer can support additional boards.)

Two Modem Servers

When a Modem Server resides on both the primary server and the secondary server, the active server utilizes two Modem Servers equally to send and receive faxes.

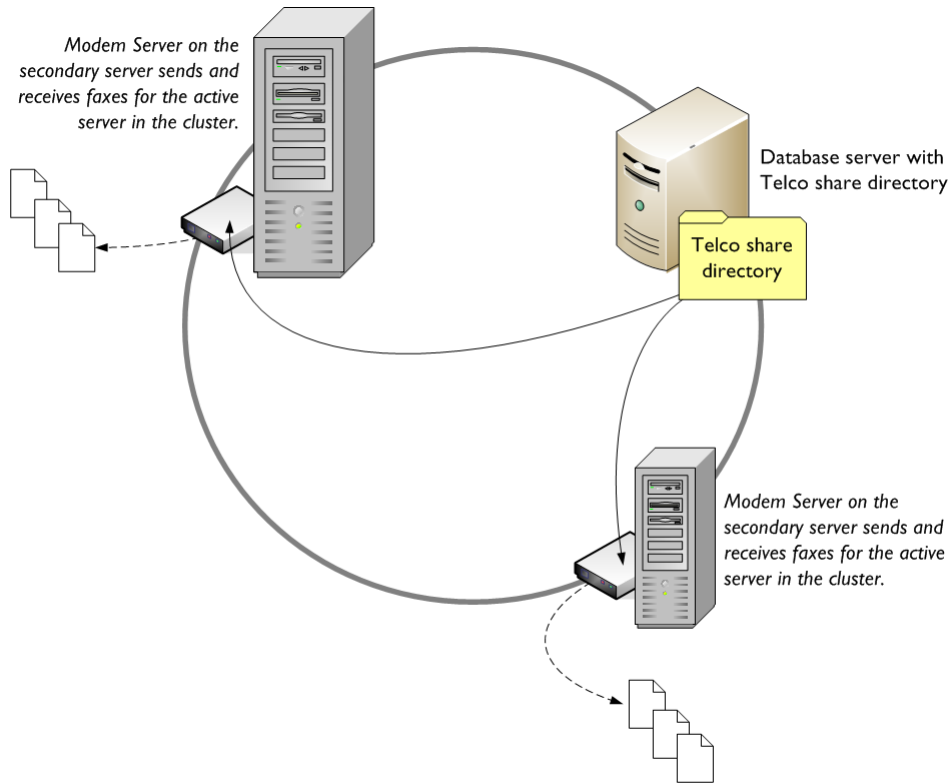


This configuration requires at least two fax boards. (You can install multiple fax boards on the each server if it can support additional boards.)

Note: Alternatively, the Modem Server can reside on the database server and one of the servers in the cluster.

Three Modem Servers

When a Modem Server resides on the primary server, the secondary server, and the database server, the active server utilizes three Modem Servers equally to send and receive faxes.



This configuration requires at least three fax boards. (You can install multiple fax boards on each server in the cluster if it can support additional boards.)

Setting up the servers in the cluster

Step 1: Setting up the database server

Installing SQL Server

Install SQL Server 2000 on the database server in the cluster. This is a requirement.

Creating directories on the database server

Before you install the server software on the primary server, go to the database server and create these directories anywhere in the local directory structure:

- \Messages (Stores the message database.)
- \Config (Stores the configuration files for the server.)
- \Locks (Stores objects in use by the message server.)

Share these directories, and configure their permissions so that the server account has read, write, and delete permissions. For more information on sharing directories and assigning permissions, consult Windows help.

Creating a telco share

To create a telco share:

1. Create a directory on the database server. Use a friendly name that you and other network administrators can identify easily.
2. Share the directory, and configure the permissions so that the server account has read and write access to the directory. For more information on sharing directories and assigning permissions, consult Windows help.

Note: You must grant read and write permissions to all server accounts that require access to this directory. This applies if you have multiple AccuRoute or Genifax servers that were installed using different server accounts.

Step 2: Setting up the primary server

Installing the server software

Complete the server installation on the primary server as if you are setting up a single server that does not belong to a cluster. During the installation, the setup program for the server prompts you to indicate the location where the database should be created; specify the name of the database server.

Configuring the server to use the telco share on the database server

To configure the server to use the telco share on the database server:

1. Start the Administrator.
2. Expand the *computer name* associated with the server that should use the telco share.
3. Expand *Connectors* and double-click the *Telco connector* in the details pane.
4. Click the **Advanced** button on the General tab.
5. Type the path to the telco share in the text box (`\\DatabaseServerName\ShareName`) and click **OK**.
6. Click **OK** to save your changes to the Telco connector.

Moving logicals from the primary server to the database server

When you set up the database server, you created `\Config`, `\Messages`, and `\Locks` directories. Go to the `\Config`, `\Messages`, and `\Locks` directories on the primary server, copy the files in these directories, and paste them to the `\Config`, `\Messages`, and `\Locks` directories on the database server.

To copy the files from the primary server to the database server:

1. Locate the `\Messages` directory on the primary server. (The default location of the `\Messages` directory is: `C:\Program Files\Omttool\OmttoolServer\Messages`) Select all the files in this directory, copy them to the clipboard, and paste them in the `\Messages` directory on the database server.
2. Locate the `\Config` directory on the primary server. (The default location of the `\Config` directory is: `C:\Program Files\Omttool\OmttoolServer\Config`) Select all the files in this directory, copy them to the clipboard, and paste them in the `\Config` directory on the database server.

3. Locate the \Locks directory on the primary server. (The default location of the \Locks directory is: C:\Program Files\Omtool\OmtoolServer\Locks) Select all the files in this directory, copy them to the clipboard, and paste them in the \Locks directory on the database server.

Now you must configure the primary server to use the \Config, \Messages, and \Locks directories on the database server.

To configure the primary server to use the \Config, \Messages, and \Locks directories on the database server:

- I. Stop all the Omtool services.

Tip: The names of all services associated with AccuRoute or Genifax begin with “Omtool”. If necessary, sort the list of services by Name to locate all the Omtool services easily.

2. Click the **Start** button and select **Run**.
3. Type `regedit` and press **ENTER**.
4. Navigate to the following directory in the registry:
HKEY_LOCAL_MACHINE\SOFTWARE\OMTOOL\GENIFAX\CURRENT_VERSION\LOGICALS
5. Edit the MESSAGES key. Type the path to the \Messages directory on the database server in the *Value data* text box. (Use a trailing backslash after the \Messages directory. For example:
`\\DatabaseServerName\DirectoryName\Messages\`)
6. Edit the MESSAGES_UNC key. Type the path to the \Messages directory on the database server in the *Value data* text box. (The path should match the path used in the previous step.)
7. Edit the CONFIG key. Type the path to the \Config directory on the database server in the *Value data* text box. (Use a trailing backslash after the \Config directory. For example:
`\\DatabaseServerName\DirectoryName\Config\`)
8. Edit the LOCKS key. Type the path to the \Locks directory on the database server in the *Value data* text box. (Use a trailing backslash after the \Locks directory. For example:
`\\DatabaseServerName\DirectoryName\Locks\`)
9. Close the registry editor.
10. Restart all the Omtool services.

Step 3: Setting up the secondary server

Complete the server installation on the secondary server. (The setup should be exactly the same as the primary server.) During the setup, quit the server configuration wizard without configuring any server settings. When you are prompted to run the wizard the next time you start the Administrator, click **No**.

Creating the cluster

Important! Before creating the cluster, verify that the primary server can send and receive documents and/or faxes successfully.

To configure the cluster from the secondary server:

1. Start the Administrator on the secondary server.
2. Right-click the *computer name* of the secondary server in the console tree and select **Properties**.
3. Click the **Cluster** tab.
4. Click the **Set up cluster** button.
5. Type the name of the primary server in the *Name* text box.
6. Type the name of the primary server's domain in the *Domain* text box, the user name associated with the server account in the *User* text box, and the password associated with the server account in the *Password* and *Confirm* text boxes. Click **Finish**.

The Cluster Manager service starts on the secondary server and begins monitoring the message database on the database server. Restart both servers. First restart the primary server, and then restart the secondary server.

Simulating a failure

To simulate a failure on the primary server and test the cluster configuration:

1. Start the Windows Task Manager on the primary server and the secondary server and click the **Processes** tab.
 - The *OMSvrClusterMgr* process should be running on both servers.
 - The connector processes (OmCon*) should be running on the primary server only. This indicates that the primary server is the active server in the cluster.
2. Shut down the primary server. Within two minutes, the connector processes (OmCon*) should be running on the secondary server.
3. Start the primary server. Once the server has been online for about two minutes (after it finishes booting), the connector services (OmCon*) should stop running on the secondary server and start running on the primary server.



Chapter 8: Introduction to the Administrator

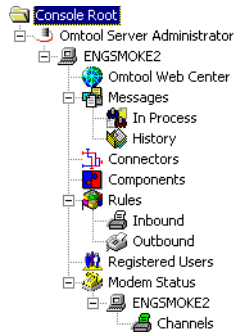
In this chapter...

- "Getting started using the Administrator" on page 138
- "Connectors" on page 139
- "Components" on page 144
- "Messages" on page 148
- "Rules" on page 149
- "Modem Status" on page 150
- "Registered Users" on page 151
- "Omtool Web Center" on page 152

Getting started using the Administrator

The Administrator, a snap-in to the Microsoft Management Console, is the application that allows you to manage the AccuRoute and Genifax servers in your environment.¹

When you start the Administrator, the console tree displays a series of containers. This chapter describes each of these containers (and their subcontainers) generally.



Above: The Console Root displays the Omtool Server Administrator, an MMC snap-in. The Omtool Server Administrator displays the properties of each server separately. (Only one server, ENGSMOKE2, appears in this screen capture.) You can access the properties of a server using the containers in the console tree, which include (top to bottom) Omtool Web Center, Messages, Connectors, Components, Rules, Registered Users, and Modem Status.

-
1. The Administrator allows you to manage all the AccuRoute and Genifax servers in your environment; however, these servers must be located in the same domain or in different domains that share a bidirectional trust.

Connectors

Connectors have two primary functions:

- To collect outbound documents and faxes from e-mail applications, other enterprise applications, office machines, and file shares.
- To deliver inbound and outbound documents, faxes, and notification messages to recipients via e-mail applications, other enterprise applications, databases, office machines, and file shares.

Your server supports the connectors described in this section. (Some of these connectors require licenses.)

Database connector

Description: Allows the server to route inbound documents and faxes to a SQL or Access database.

Type: Inbound

Supported with: AccuRoute, Genifax

DMS connector

Description: Allows your server to route documents to document management systems, including Accutrac™ 8.0, Hummingbird® DM™ 5.1, Hummingbird® DOCS Open® 3.9, Hummingbird® PowerDOCS® 4.0, XEROX® DocuShare® 2.2/3.0, iManage® InfoRite® 5.2/5.3 or iManage® DeskSite™ 6.0.1/6.6, TRIM Context® 5.2, and Windows FileShare.

Type: Inbound (document must include routing sheet generated with the AccuRoute Client)

Supported with: AccuRoute

Notes: AccuRoute Client required

Exchange connector

Description: Allows your Genifax server to communicate with an Exchange server. For inbound faxes, the Genifax server performs DID/DTMF lookups in Active Directory or LDAP to determine the correct

recipients, and routes these faxes to the Exchange connector, enabling the Exchange server to deliver them to user e-mail accounts. For outbound faxes, users can create and send faxes from Outlook using the Genifax Send form or the Outlook New Message form. The Exchange server routes these outbound faxes to the Exchange connector on the Genifax server. Supported functionality includes DID/DTMF lookup to determine the recipients of inbound documents, sender lookup to populate the cover pages of outbound documents, recipient lookup to populate the cover pages of outbound documents, non-delivery reports, failover support when used with additional Exchange connectors, faxes sent from Outlook, and Forms Publisher for publishing Genifax Send forms to public folders. Compatible with the Genifax Desktop and Genifax LE Desktop.

Type: Inbound, Outbound

Supported with: AccuRoute, Genifax

Notes: Telco connector required

Fax Sr. connector

Description: Connects the Genifax server and the Fax Sr. server. Enables the Genifax server or the Fax Sr. server to deliver all outbound faxes on behalf of both fax server applications.

Type: Outbound

Supported with: AccuRoute, Genifax

Notes: Telco connector required

Filescan connector

Description: Routes inbound documents to a folder in the local area network and collects outbound documents and faxes from Filescan folders in the local area network. Users and network scanning devices can copy documents to Filescan folders where the Filescan connector collects them.

Type: Inbound, Outbound

Supported with: AccuRoute, Genifax

HP LAN Fax connector

Description: Provides your company with a method of sending outbound faxes from an HP Digital Sender through the Genifax server. When configured for a Genifax server, the Digital Sender copies scanned documents to a shared folder where the HP LAN Fax connector collects them.

Type: Outbound

Supported with: AccuRoute, Genifax

Notes: Telco connector required

Notes connector

Description: Allows your Genifax server to communicate with a Notes/Domino server. For inbound faxes, the Genifax server performs DID/DTMF lookups to determine the correct recipients, and routes these faxes to the Notes connector, enabling the Notes/Domino server to deliver them to user e-mail accounts. For outbound faxes, users can create and send faxes from Notes using the Genifax Fax Memo form or the Notes New Memo form. The Notes/Domino server routes these outbound faxes to the Notes connector on the Genifax server. Supported functionality includes DID/DTMF lookup to determine the recipients of inbound documents, and faxes sent from Notes. Compatible with the Genifax Desktop and Genifax LE Desktop.

Type: Inbound, Outbound

Supported with: AccuRoute, Genifax

Notes: Telco connector required

Omtool connector

Description: Manages the communications between the server and its connectors. All servers require the Omtool connector; it cannot be deleted.

Type: Inbound, Outbound

Supported with: AccuRoute, Genifax

Printer connector

Description: Allows the server to route documents and faxes to printers in the local area network.

Type: Inbound, Outbound

Supported with: AccuRoute, Genifax

Notes: The Printer connector supports printing to a UNC path (\\PrintServer\Printer) when the print server is located in the same domain as the server or in another domain that has a bidirectional trust with the server's domain. The Printer connector supports printing to an IP address when the Xerox Walk-Up Printing Driver 2.0 has been installed on the server and the destination printer is a Xerox multifunction device in the local area network. (You can download the Xerox Walk-Up Printing Driver 2.0 from the Xerox web site.)

SAP connector

Description: Allows the server to communicate with SAP applications such as Business Workplace. Collects outbound faxes and routes inbound faxes to shared folders on the SAP ComServer.

Type: Inbound, Outbound

Supported with: AccuRoute, Genifax

Notes: Telco connector and SAP ComServer required. ComServer can be installed from the AccuRoute or Genifax installation CD.

SMTP connector

Description: Allows the server to communicate with an SMTP mail server.

Type: Inbound, Outbound

Supported with: AccuRoute, Genifax

Notes: Requires Internet Information Services (IIS) on the AccuRoute or Genifax server. Works in conjunction with an SMTP mail server or a virtual SMTP mail server that has been configured to act as a smart host.

SSR connector

Description: Allows a server to route an outbound fax to another server that is located closer to the dialing destination. When the server closest to a dialing destination delivers a fax, your company can cut calling costs associated with sending faxes.

Type: Outbound

Supported with: AccuRoute, Genifax

Notes: Telco connector required.

Telco connector

Description: Manages Modem Servers for an AccuRoute or Genifax server. (A Modem Server is a computer where you have installed a fax board and Modem Server software.) Because the settings in the Telco connector apply to all the Modem Servers it manages, sometimes servers require multiple Telco connectors, especially in cases where the company has Modem Servers located in different calling areas.

Type: Outbound

Supported with: AccuRoute, Genifax

Notes: Supported fax modem, modem drivers, and adequate telephone service from your local telephone service provider required.

XeroxScan connector

Description: Provides your company with a method of sending hard-copy documents from a Xerox multifunction device through an AccuRoute or Genifax server. When configured, the Xerox MFD copies scanned documents to a repository where the XeroxScan connector collects them. Works in conjunction with Network Fax and network scanning templates on the Xerox MFD.

Type: Outbound

Supported with: AccuRoute, Genifax

Notes: Mail connector and Telco connector required

Components

Approval Manager component

The Approval Manager component analyzes every outbound fax and determines whether it requires approval. If the fax requires approval, an approval manager must approve the fax before the server can deliver it.²

This component appears in the Administrator on an AccuRoute server and a Genifax server; however, only servers licensed as Genifax servers can use functionality associated with this component.

Approval Pending component

The Approval Pending component holds an outbound fax that requires approval until an approval manager approves or declines the fax. If the fax is approved, the server continues preparing the fax for delivery. If the fax is declined, the server stops preparing the fax for delivery. In both cases, the server captures the approval manager's comments and sends them to the sender in an e-mail notification message with the results of the review.

This component appears in the Administrator on an AccuRoute server and a Genifax server; however, only servers licensed as Genifax servers can use functionality associated with this component.

Billing component

The Billing component extracts billing information, including billing codes, from an outbound document or fax and saves this information in a table. Works in conjunction with *CostRecovery*, an application that allows your company to recover costs associated with sending documents and faxes.

Compose component

The Compose component performs several functions: it converts files into the appropriate formats such as PDF or TIFF for delivery, generates notification messages for senders, recipients, and approval managers, and creates cover pages for outbound documents and faxes.

2. A fax can require approval or review, but not both.

Delivery Pending component

When the server has finished preparing an inbound or outbound document or fax for delivery, the Delivery Pending component holds the document or fax until a connector delivers the document or fax to a recipient or destination, or to another application that executes the delivery.

Dispatch component

As soon as a connector collects a document or fax—inbound or outbound, the Dispatch component analyzes the document or fax, applies routing rules, and routes it to a component or connector. Before routing an outbound fax to a component or connector, the Dispatch component normalizes the destination address.

Embedded Directive Manager component

The Embedded Directive Manager component analyzes documents and faxes. Depending on the routing rule that applied to an individual document or fax, this component might scan the document and detect the embedded directive, apply a specific embedded directive to the document, or recognize an embedded directive that has been associated with the document. After identifying the embedded directive³ that should be associated with the document, the Embedded Directive Manager component retrieves delivery instructions for the document and makes this information available to the server.

FaxCenter Routing component

The FaxCenter Routing component routes inbound faxes to FaxCenter⁴ based on routing rules. Until a user routes a fax to its final destination, the fax resides in the FaxCenter Routing component.

This component appears in the Administrator on an AccuRoute server and a Genifax server; however, only servers licensed as Genifax servers can use functionality associated with this component.

Lookup Manager component

The Lookup Manager component performs for several reasons: lookup determines the recipient of an inbound fax, retrieves information about a sender for use on cover pages, and retrieves information about a recipient for use on cover pages.

-
3. Embedded directives provide secure fax delivery in Genifax and document routing in AccuRoute.
 4. FaxCenter is a client application used for inbound fax routing.

Maintenance component

The Maintenance component archives documents and faxes from the server database to another database or folder, and cleans up the server database by removing old documents, faxes, and billing records.⁵

Notification component

The Notification component analyzes each document or fax, and determines identifies all notification messages required for it. The sender, recipient, or approval manager associated with a document or fax might require notification.

Preview Manager component

The Preview Manager component analyzes an outbound fax and determines whether the sender requested a preview. If the fax requires a preview, the sender must preview the fax and accept it before the server can deliver it.

This component appears in the Administrator on an AccuRoute server and a Genifax server; however, only servers licensed as Genifax servers can use functionality associated with this component.

Preview Pending component

The Preview Pending component holds an outbound fax that requires a preview until the sender accepts or rejects the fax. If the fax is accepted, the server continues preparing the fax for delivery. If the fax is rejected, the server stops preparing the fax for delivery.

This component appears in the Administrator on an AccuRoute server and a Genifax server; however, only servers licensed as Genifax servers can use functionality associated with this component.

Recipient Registration Manager component

The Recipient Registration Manager component analyzes an outbound fax and determines whether the sender requested secure fax delivery. If the sender requested secure fax delivery, this component determines whether the recipient has previously registered as a secure fax destination. If the recipient has not registered,

5. The archive and cleanup functions are complimentary and should be configured together. For example, each document or fax should be archived to another database or folder before it is removed from the server database.

the Recipient Registration Manager component generates a notification message and sends it to the recipient.

Recipient Registration Pending component

When a sender requests secure fax delivery and the recipient has not registered as a secure fax destination, the Recipient Registration Pending component holds the fax until the recipient registers. Once the recipient registers as a secure fax destination⁶, the Recipient Registration Pending component releases the fax to the recipient and allows all faxes to be delivered automatically to the same recipient.

Review Manager component

The Review Manager component analyzes each outbound fax and determines whether a review is required.⁷

Note: A fax can require approval or review, but not both.

This component appears in the Administrator on an AccuRoute server and a Genifax server; however, only servers licensed as Genifax servers can use functionality associated with this component.

Review Pending component

The Review Pending component holds an outbound fax that requires review until an approval manager accepts or rejects the fax. When the review is complete, the server captures the approval manager's comments and sends them to the sender in an e-mail notification message with the results of the review.

This component appears in the Administrator on an AccuRoute server and a Genifax server; however, only servers licensed as Genifax servers can use functionality associated with this component.

6. The Embedded Directive Manager component handles the registration request.
 7. Unlike approval and preview, the outcome of the review does not determine whether the server can deliver the fax. Review simply allows the sender to receive feedback from an approval manager.

Messages

The Messages container in the console tree allows you to locate, track, and manage documents and faxes on the server. The In Process container displays documents and faxes that are active on the server. Once the server has completely finished processing a document or fax, it appears in the History container.

You can customize the view of the In Process and History folders so that they display only documents and faxes from today, this week, or this month. Additionally, you can sort documents and faxes by their properties, and view them by their current processing state and status on the server or their final state in the History.

Tip: If your server has a Telco connector and you want to test the server installation or troubleshoot faxes, you can send a Quick Fax. A Quick Fax is a fax that originates on the server, so you do not need to use an e-mail client application to send it and it does not rely on a connector to enter the server. This feature is helpful when you have completed the server installation and you want to test the functionality of the fax board.

Rules

The server applies rules to all documents and faxes (inbound and outbound) systematically. When you installed the server software, the installation program created some default routing rules for you, such as the rule that routes all documents and faxes with a printer destination to the Printer connector. Additionally, you can create an unlimited number of rules, customize them for your company, and order them to achieve the desired behavior.

When you want to create or modify an inbound or outbound rule, a wizard-based application assists you in:

- selecting criteria for the rule;
- choosing an action for documents and faxes that match the rule;
- choosing a failover action for documents and faxes that match the rule (the failover action applies to the document or fax if the primary action fails);
- naming the rule;
- selecting special options, such as whether the server should stop applying other rules to a document or fax after applying a rule;
- and ordering the rules to achieve the desired behavior.

You should review the rules whenever you add a connector to the server or modify the functionality of the server in some general way.

Modem Status

The Modem Status container in the console tree allows you to view the status of all modem channels associated with your server⁸. At a quick glance, you can:

- identify a channel by its channel number.
- view the mode of each channel. The mode indicates whether the channel has been configured for sending only, receiving only, or both sending and receiving.
- view the current status of the channel to determine whether it is listening for faxes, stopped, or processing faxes.
- view the details of a fax as it being processed by a channel.

You can modify the properties of individual channels and general properties that apply to the Telco connector by modifying the properties of the Telco connector.

8. This feature applies to servers with Telco connectors. If your server does not have a Telco connector, the Modem Status container appears in the console tree, but does not display any channels in the details pane.

Registered Users

The Registered Users container in the console tree allows you to manager the database of registered users. You should register a user if:

- the user is an approval manager⁹ to another user. (Genifax only)
- the user's outbound faxes require approval or review. (Genifax only)
- you want to grant the user permissions to run FaxCenter. (Genifax only)
- you want to assign delegates¹⁰, assistants¹¹, or a printer¹² to the user.
- you want to grant the user permissions to run the AccuRoute Client. (AccuRoute only)
- you want to grant the user permissions to send faxes using the Web Client¹³. (Genifax only)
- you want to apply a ruleset¹⁴ to a particular user.

A user can become a registered user automatically if the user chooses a delegate, assistant, or printer using the Web Client. (The Web Client is a web-based application associated with Genifax servers.) In this instance, the server automatically registers a user, and the newly registered user inherits additional properties from the default recipient.

9. An approval manager is a user who can approve or review faxes that another user sends.
 10. A delegate is a user who can send a fax on behalf of another user. This feature is available from the Genifax LE Send form only.
 11. An assistant is a user who receives a copy of all faxes that another user sends and receives.
 12. A printer generates a copy of all faxes that a user sends and receives.
 13. A web-based application for Genifax.
 14. A ruleset is a method of linking a routing rule to a user.

Omtool Web Center

The Web Center is a direct link to the Omtool Support web site that provides you with access to product announcements, updates and service releases, news alerts, documentation, and other valuable information.

Chapter 9: Installing client applications

In this chapter...

- "AccuRoute Client" on page 154
- "CostRecovery" on page 161
- "FaxCenter" on page 163
- "Genifax Desktop Client - Corporate Edition" on page 176
- "Genifax Desktop Client - Legal Edition" on page 184

AccuRoute Client

The AccuRoute Client is a desktop application that enables users to submit messages—both hard copy and electronic documents—to the AccuRoute server. Once documents enter the messaging system, the server processes these documents and sends them to their final destinations. Depending on the connectors you will use with AccuRoute, the server can route these outbound documents to e-mail recipients, fax recipients, databases, folders, document management systems, document repositories, and printers.

How does this work? The AccuRoute Client user creates a “routing sheet” that specifies the destinations for an outbound message. The server generates an embedded directive¹ for this routing sheet. The embedded directive, a data string, appears on the routing sheet and gets stored on the server.

Now that the server has generated an embedded directive for the routing sheet, the user can do either of the following:

- Print the routing sheet. To submit the outbound message to the server, the user will take the routing sheet and all documents that should be part of the outbound message to a network scanner. The user will specify a network folder as the destination for the scanned image.

The scanner saves the scanned image as a file in the specified folder, and the Filescan connector allows the file to enter the messaging system as an outbound message. The server detects the embedded directive, and processes the outbound message according to the instructions associated with the embedded directive.

- Save the routing sheet to the desktop. To submit the outbound message to the server, the user will create an e-mail message, attach the routing sheet and all documents that should be part of the outbound message, and send the e-mail message to a special SMTP-formatted address.

The SMTP connector allows the outbound message to enter the messaging system as an outbound message. The server detects the embedded directive, and processes the outbound message according to the instructions associated with the embedded directive.

1. An embedded directive is an encoded key. This key is associated with processing instructions for the outbound message.

Note: The AccuRoute Client requires some specific configuration on the AccuRoute server. You need to configure the Filescan connector and/or the SMTP connector to allow outbound messages to enter the messaging system, and instruct users on how they should submit their messages to the AccuRoute server.

Tip: The Filescan connector is the ideal solution for getting hard copy documents into the messaging system, while the SMTP connector is the ideal solution for electronic documents.

This section provides you with the steps you need to install the AccuRoute Client on client systems in your company's network and configure the application so that it can profile documents to your company's document management system or repository.

Requirements

The system where you will install the AccuRoute Client must meet the following minimum requirements:

- Pentium®-class processor
- Windows® XP Professional/2000 with SP3 or later
- 20 MB hard disk space
- 64 MB RAM (128 recommended)
- Internet Explorer 6.0
- Microsoft® Outlook® 2003/2002/2000, Notes 6.5/6.0/5.0, or Novell GroupWise 6.0/5.5
- Acrobat® Reader® 5.0 or later

Supported document management systems and document repositories

The AccuRoute Client supports several document destination types, including document management applications:

- Accutrac™ 8.0
- Hummingbird® DM™ 5.1
- Hummingbird® DOCS Open® 3.9

- Hummingbird® PowerDOCS® 4.0
- XEROX® DocuShare® 2.2/3.0
- iManage® InfoRite® 5.2/5.3
- iManage® DeskSite™ 6.0.1/6.6
- TRIM Context® 5.2
- Windows Fileshare

Tip: Omtool supports document management applications via the Omtool DMS Libraries. Periodically Omtool releases updates to the Omtool DMS Libraries. Updates often include support for new document management applications, as well as resolutions to issues reported in the previous release. To check for updates, visit <http://www.omtool.com/support> and go to the Downloads & Docs section.

Installing the AccuRoute Client

There are two ways you can install the AccuRoute Client on client systems:

- Run the setup program. As soon as you run the setup and complete the InstallShield wizard, the user can begin creating routing sheets and submitting documents to the AccuRoute server.² If you want to install the AccuRoute Client using this method, see "Running the setup program" on page 157.
- Perform a silent installation. This command line procedure allows you to deploy the application to the user's desktop silently, meaning that you do not disrupt the user who might be working. If you want to install the AccuRoute Client using this method, see "Performing a silent installation" on page 157.

Tip: After you install the AccuRoute Client using the silent installation program, you can configure the AccuRoute Client to support document management applications. (Instructions are provided in the AccuRoute Client help.)

-
2. This requires that you have installed the AccuRoute server and configured it with the appropriate connectors that allow the server to collect files from various sources, process them, and deliver them to their intended recipients.

Running the setup program

Tip: The setup program for the AccuRoute Client is located on the server in the `\Omtool\OmtoolServer\Clients\AccuRouteClient` directory. You can invoke the setup program from the server or client. If you plan to invoke the setup program from the server, map a drive to the client. If you plan to invoke the setup program from the client, verify that the `\Omtool\OmtoolServer\Clients\AccuRouteClient` directory on the server is shared.

To install the AccuRoute Client:

1. Log on to the server or client, navigate to the `\Omtool\OmtoolServer\Clients\AccuRouteClient` directory on the server, and double-click **setup.exe**. The InstallShield Wizard for the AccuRoute Client begins and displays the *Welcome* screen.
2. Click **Next**. The *License Agreement* screen appears.
3. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.
4. Click **Browse**, navigate to the location where you want to install the AccuRoute Client, select the installation directory, click **OK**, and click **Next**. The *AccuRoute Client* screen appears.
5. Choose the mail system that this installation of the AccuRoute Client should support. Select the **Microsoft Outlook** option, the **Lotus Notes** option, or the **Novell GroupWise** option and click **Next**. The *Start Copying Files* screen appears.

Note: The mail system you select must already be installed on the system where you are installing the AccuRoute Client.

6. Review the installation settings and click **Next** to begin installing the AccuRoute Client. The *InstallShield Wizard Complete* screen appears.
7. Click **Finish**.

The installation is complete.

Performing a silent installation

To install the AccuRoute Client silently, you need to record an InstallShield settings file, prepare the setup files with the appropriate information such as the path to the target installation directory and the name of the e-mail application you want the

AccuRoute Client to support, and then launch the silent installation program from a command line.

Recording an InstallShield settings file

Using the following procedure, you will create an InstallShield settings file (setup.iss) for the silent installation. This file allows InstallShield to add information about the AccuRoute Client to your computer.

Note: As you complete the setup, configure the installation appropriately for the target systems in your environment.

To create an InstallShield settings file:

1. Open a Windows command prompt on the server.
2. Set the directory to the \Omtool\OmtoolServer\Clients\AccuRouteClient directory.

Tip: For help using the Windows command prompt, type `cd /?` and press **ENTER**.

3. Type `setup.exe /r /f1"[location of \Omtool\OmtoolServer\Clients\AccuRouteClient directory on the server]"` and press **ENTER**.

Note: Replace [location of \Omtool\OmtoolServer\Clients\AccuRouteClient directory on the server] with the location of the \Omtool\OmtoolServer\Clients\AccuRouteClient directory on the server. For example: `setup.exe /r /f1"c:\Program Files\Omtool\OmtoolServer\Clients\AccuRouteClient\setup.iss"`

The InstallShield Wizard for the AccuRoute Client begins and displays the *Welcome* screen.

4. Click **Next**. The *License Agreement* screen appears.
5. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.

6. Click **Browse**, navigate to the location where you want to install the AccuRoute Client, select the installation directory, click **OK**, and click **Next**. The *AccuRoute Client* screen appears.
7. Choose the mail system that this installation of the AccuRoute Client should support. Select the **Microsoft Outlook** option, the **Lotus Notes** option, or the **Novell GroupWise** option and click **Next**. The *Start Copying Files* screen appears.

Note: The mail system you select must already be installed on the system where you are installing the AccuRoute Client.

8. Review the installation settings and click **Next** to begin installing the AccuRoute Client. The *InstallShield Wizard Complete* screen appears.
9. Click **Finish**. The installation is complete.

Proceed to the next section.

Configuring the silent installation settings

Using the following procedure, you will prepare the setup files with the appropriate information, including the path to the target installation directory and the name of the e-mail application you want the AccuRoute Client to support.

To prepare the setup files for the AccuRoute Client silent installation:

1. Navigate to the \Omtool\OmtoolServer\Clients\AccuRouteClient directory on the server, and open silent.ini in Notepad.
2. Locate the following line that specifies the target installation directory:
`InstallDir=C:\Program Files\Omtool\AccuRouteClient`
After `InstallDir=`, type the path to the target installation directory.
3. Locate the following line that specifies the e-mail application the AccuRoute Client will support: `EMail=Outlook`
After `EMail=`, type the name of the e-mail application you want the AccuRoute Client to support. Possible values for this setting are `Outlook`, `LotusNotes`, and `Groupwise`.
4. Save the silent.ini file and close it.
5. Open the setup.iss file in Notepad.

6. Locate the following line that specifies the target installation directory:

```
szDir=C:\Program Files\Omttool\AccuRouteClient\
```

Verify that the path to the target installation directory is the same path you specified in the silent.ini file.

7. Save the file and close it.

Now that you have prepared the setup files, you are ready to launch the silent installation program.

Launching the silent installation program

Using the following procedure, you will launch the silent installation program and install the AccuRoute Client silently.

To launch the silent installation program for the AccuRoute Client:

1. Open a command prompt.
2. Set the directory to the \Omttool\OmttoolServer\Clients\AccuRouteClient directory where the setup files are located.

Tip: For help on changing drives and directories using the command prompt, type `cd/?` and press **ENTER**.

3. Type `setup.exe /s /f1"[location of setup.iss file]"` and press **ENTER**.

Note: Replace `[location of setup.iss file]` with the location of the InstallShield settings file (`setup.iss`) you created in a previous section. For example: `setup.exe /s /f1"c:\Program Files\Omttool\OmttoolServer\AccuRouteClient\setup.iss"`

The silent installation program installs the AccuRoute Client to the location specified in the silent.ini file.

The installation is complete.

CostRecovery

CostRecovery is a stand-alone application that can extract billing data from the messaging system. CostRecovery creates a file that you can post to your company's billing system to recover costs associated with sending and receiving documents.

In addition, CostRecovery includes the following features:

- The ability to collect message or document transactions from the message database on the server.
- Customizable templates that can meet the needs of your billing system.
- The ability to price by page, and to assign different prices for the first page and all additional pages, and to add a maximum price for any given message.
- The ability to price local, long distance, and international calls differently, and to assign a maximum cost for each type of call. (This feature applies to faxing.)
- The ability to price by page for copies, scanned documents, and storing documents in a document management system.
- A scheduling feature that you can use to run automatically on a daily basis.
- The ability to parse partial strings from billing codes and to remove leading zeros from numeric billing codes.
- The ability to collect data associated with inbound and outbound messages.

Requirements

The system where you will install CostRecovery must meet the following minimum requirements:

- Pentium®-class processor, 300 MHz or faster
- 20 MB hard disk space
- 64 MB RAM (128 recommended)
- Windows® XP Professional/2000 with SP3 or later

Installing CostRecovery

Note: The setup program for this application is located on the server in the `\Omtool\OmtoolServer\Clients\CostRecovery` directory. You can run the setup from the server or the client. If you run the setup from the client, share the `\Omtool\OmtoolServer\Clients\CostRecovery` directory on the server so that you can access it from the client, and map a drive on the client to the `\Omtool\OmtoolServer\Clients\CostRecovery` directory on the server if necessary.

To install CostRecovery:

1. Log on to the server (if necessary), navigate to the `\Omtool\OmtoolServer\Clients\CostRecovery` directory, and double-click **setup.exe**. The InstallShield Wizard for CostRecovery begins and displays the *Welcome* screen.
2. Click **Next**. The *License Agreement* screen appears.
3. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.
4. Click **Browse**, navigate to the location where you want to install CostRecovery, select the installation directory, click **OK**, and click **Next**. The *Genifax Server* screen appears.
5. Type the computer name or IP address of the server in the *Genifax Server* text box and click **Next**. The *Start Copying Files* screen appears.
6. Review the installation settings and click **Next** to begin installing CostRecovery. The *InstallShield Wizard Complete* screen appears.
7. Click **Finish**. The installation is complete.

Now that you have completed the CostRecovery installation, you can begin configuring CostRecovery to collect billing data from the messaging system.

Note: In addition to configuring CostRecovery to collect data from the messaging system, you must also enable the Billing component on the server and configure it to collect the information you need. For more information, refer to the Administrator help: <http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm>

For documentation on CostRecovery, go to the `\Omtool\CostRecovery` directory and view the `OmtoolCostRecovery.pdf` file.

FaxCenter

FaxCenter is a fax routing application. While many inbound faxes will be routed directly to recipients in your company, there are instances when someone needs to review an inbound fax, determine its most appropriate recipient or destination, and send the fax to that recipient or destination.

You can set up an inbound routing rule that determines which faxes need to be reviewed and routed to the appropriate recipients and destinations. When these inbound faxes arrive on the server, they are routed to FaxCenter users. FaxCenter users determine the most appropriate recipients and destinations for each fax and route faxes accordingly.

As you follow the procedures in this chapter, you will:

- Install FaxCenter on client systems.
- Add FaxCenter users to Registered Users in the Administrator and give them permissions to run FaxCenter and use the appropriate features.
- Set up inbound routing rules on the server that determine which faxes get routed to FaxCenter.

Once you have completed these steps, FaxCenter users can route faxes to e-mail recipients, fax machines, network printers, and document management systems. They might also be able to release outbound faxes in Registration Pending to secure destinations.

Requirements

Before you install FaxCenter on a client system, verify that the system meets all the requirements in this section.

System requirements for FaxCenter

The system where you will install FaxCenter must meet the following minimum requirements:

- Pentium®-class processor, 400 MHz or faster
- 128 MB RAM
- 2 GB hard drive with a minimum of 50 MB free space
- Windows® XP Professional/2000 Professional with SP1 or later

Supported document management systems and document repositories

FaxCenter supports routing faxes to the following document management systems and document repositories:

- Accutrac™ 8.0
- Hummingbird® DM™ 5.1
- Hummingbird® DOCS Open® 3.9
- Hummingbird® PowerDOCS® 4.0
- XEROX® DocuShare® 2.2/3.0
- iManage® InfoRite® 5.2/5.3
- iManage® DeskSite™ 6.0.1/6.6
- TRIM Context® 5.2
- Windows Fileshare

E-mail account

The FaxCenter user must have an e-mail account on your company's e-mail server. You need this e-mail address to add the FaxCenter user as a Registered User in the Administrator, and the FaxCenter user needs this address to log in to FaxCenter.

Image viewer for Windows XP

For systems with Windows XP, you need to install Imaging for Windows Professional Edition (PRO), an image viewer that allows the FaxCenter user to view faxes in TIF file format.

Note: The Windows 2000 operating system includes Imaging for Windows.

For more information, go to the Imaging for Windows product page:

http://www.kofile.com/products/wmx/pro/pro_overview.htm

Registering FaxCenter users

In order to run FaxCenter, FaxCenter users must be Registered Users on the server. When you create a Registered User, you can enable the user as a FaxCenter user, assign the user permissions to use FaxCenter features, and configure other properties for this user.

Using the following procedure, you will create a user account in the Administrator under *Registered Users*. If you have already created a user account for the FaxCenter user, you will modify the user's FaxCenter properties.

To create a new user or modify the FaxCenter properties of a registered user:

1. Start the Administrator.
2. Create a new user or modify the properties of an existing user:
 - **To create a new user:** Right-click **Registered Users** in the console tree and select **New | User**. Type the name and e-mail address of the FaxCenter user in the *Name* and *E-mail* text boxes.
 - **To modify the properties of an existing user:** Click **Registered Users** in the console tree and double-click a registered user in the details pane.
3. Click the **FaxCenter** tab.
4. If you want to enable this user to use FaxCenter, select the **Enable this user as a FaxCenter user** option, and then complete the following steps.
5. If you want to assign a FaxCenter password to this user, type the password in the *Password* and *Confirm* text boxes. If you do not want to assign a password to this user, leave the text boxes empty.

6. When a FaxCenter user selects a fax in FaxCenter, the fax becomes locked so that other FaxCenter users cannot access the same fax. (This prevents multiple FaxCenter users from trying to modify or route the same fax.) Type the number of minutes you want FaxCenter to wait before it unlocks the fax this user has selected in the Automatically unlock fax after ___ minutes spin box.
7. You can create an e-mail address filter that limits the users whose e-mail addresses appear in the *FaxCenter Routing* dialog box.

Note: The filter does not prevent the FaxCenter user from routing faxes to other recipients and destinations.

If you want to create a filter, do one of the following:

- To create an e-mail address filter, use the following string:
`email=[e-mail address of a user account]`
For example: `email=user@company.com`
- To create a site filter, use the following string:
`site=[name of the Exchange 5.5 site]`
For example: `site=Finance`
- To create a name filter, use the following string:
`name=[alias of a user account]`
For example: `name=jsmith`

Note: The values you use in filters are not case-sensitive.

Tip: You can use an asterisk to indicate a wildcard. For example, if `email=*@company.com`, then FaxCenter displays the e-mail accounts in the domain you specified as potential routing destinations—in this case, “company” is the domain you specified.

8. In the *Allow User to* section, select the check box beside each option you want to enable for this user:
 - **Delete Faxes** - Allow this user to delete faxes from the *Processed Items* list in FaxCenter.
 - **Move to processed** - Allow this user to move faxes from the *New Items* list into the *Processed Items* list.

- **Combine Faxes** - Allow this user to combine multiple faxes and route them as one combined fax.
- **View Entire Fax** - Allow this user to view the entire fax. If this option is not enabled, the FaxCenter user can view only the first page of each fax.
- **Enter originator information when routing** - Allow this user to complete the *Routing Transaction Description* section³ of the *Route Selected Item* dialog box when routing a fax. This configuration setting has two additional options that you can enable:
 - **User may leave From empty** - Select this if you want the FaxCenter user to be able to leave the *From* field under *Routing Transaction Description* empty, or clear this check box if you want to require the user to provide the From information.
 - **User may leave Company empty** - Select this if you want the FaxCenter user to be able to leave the *Company* field under *Routing Transaction Description* empty, or clear this check box if you want to require the user to provide the Company information.
- **Enable or Disable Afterhours Processing** - Allow this user to set After Hours⁴ for all FaxCenter users associated with the server.
- **Release Registration Pending (HIPAA)** - Allow this user to release faxes from Recipient Registration Pending to secure destinations.

Important! Since releasing a fax can have legal ramifications in some industries, you should make sure that the FaxCenter user understands the process of secure delivery.

3. These fields allow the FaxCenter user to provide the fax recipient with information about the original fax sender. Depending on how you configure notification messages for faxes that have been routed from FaxCenter to e-mail recipients, these fields (From and Company) can appear in the notification message from the server.

4. You can create inbound or outbound routing rules that specify how the server should handle messages when it is after hours in your company. While this feature is versatile and can be configured in a variety of ways, it is most commonly used in conjunction with FaxCenter. If your company uses FaxCenter, people in your company rely on FaxCenter users to route inbound faxes in a timely manner. After Hours prevents someone in your company from missing an important fax when FaxCenter users are not in the office. When it is after hours in your company, you might want to consider routing inbound faxes to network printers so that people can retrieve them when they arrive. For more information about After Hours, refer to the Administrator help: <http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm>

- **View all Faxes in FaxCenter** - Allow this user to view all faxes in FaxCenter, even those faxes that have not been routed directly to this user for processing. When this option is enabled, this user can view all faxes on the server that currently reside in the FaxCenter Routing state. Also, this user can see faxes in all queues, including New Items, Processed Items, Found Items, and Registration Pending.
9. Select the **Route faxes as** check box if you want the server to send the routing recipient a notification message that includes a name and an e-mail address for this FaxCenter user. If you select the check box, provide the following information:
 - **Name** - Type the name you want to appear in the *From* field on all faxes that this user routes from FaxCenter. For example, the name can be the name of the user or another name, such as "John Smith, fax router" or "John Smith".
 - **E-mail** - Type the e-mail address you want to appear in the *From* field on all faxes that this user forwards from FaxCenter. For example, the e-mail address can be associated with the FaxCenter user or another person who you want to receive all replies to the forwarded fax.
 10. Click the **Select Columns to View** button if you want to configure the columns that this user will view in FaxCenter. Modify the column properties and save your changes.
 11. Click **OK** to save your changes to the properties for this registered user, or click on another tab to modify more properties for this user.

Note: When you modify a user's FaxCenter permissions while that user is currently logged into FaxCenter, the new permissions will not take effect until the next time the user logs in to FaxCenter.

Creating routing rules for inbound faxes

Using the following procedure, you will create an inbound routing rule that determines the faxes that should be routed to FaxCenter users. Once the server routes these faxes to FaxCenter, FaxCenter users will review each fax, determine the most appropriate recipients and destinations for the fax, and route the fax accordingly.

To create a rule for routing inbound faxes to FaxCenter:

1. Double-click **Rules** in the console tree.
2. Right-click **Inbound** and select **New | Rule**. The *Specify the Criteria for this Rule* screen appears.
3. Click the **Add** button, select a criterion for inbound faxes that should match this rule, and click **Next**.
4. Specify the parameters for the criterion you selected in the previous step and click **Finish**.
5. Add more criteria for inbound faxes that should match this rule, if desired, and click **Next**. The *Specify the Actions to take for this Rule* screen appears.
6. Click **Add**. The *Add Rule Action* screen appears.
7. Select **FaxCenter** and click **Next**. The *Route to FaxCenter* screen appears.
8. Select the **FaxCenter user** option only if you want the inbound faxes that match this rule to be routed to a particular FaxCenter user, and then select the FaxCenter user from the drop-down list. (If you do not select this option, inbound faxes that match this rule will be routed to all FaxCenter users.)

Type the number of hours a fax can reside in FaxCenter in the Expiration Time spin box. (If a fax has not been routed to a recipient or other destination within the allotted time, the server fails the fax and removes it from FaxCenter.)

Click **Finish**.

9. Add any other actions for inbound faxes that match this rule, if desired, and click **Next**. The *If any Action(s) fail do the following* screen appears.
10. Add the actions you want to apply to faxes that match this rule if any of the primary actions fail (optional), and click **Next**. The *Specify a name for this rule* screen appears.
11. Type a friendly name for the rule in the text box, and configure the other options in this screen as desired, and click **Finish**. The new rule wizard creates the rule and displays all the inbound routing rules.

Now that you have created an inbound routing rule for FaxCenter, order the inbound routing rules as desired.

Installing FaxCenter

Using the following procedure, you will install FaxCenter on a client system. When you complete this procedure, you will be able to route inbound faxes from FaxCenter to e-mail recipients, fax machines, network printers, and your company's document management system or document repository.

Note: The setup program for this application is located on the server in the `\Omtool\OmtoolServer\Clients\FaxCenter` directory. You can run the setup from the server or the client. If you run the setup from the client, share the `\Omtool\OmtoolServer\Clients\FaxCenter` directory on the server so that you can access it from the client, and map a drive on the client to the `\Omtool\OmtoolServer\Clients\FaxCenter` directory on the server if necessary.

To install FaxCenter:

1. Log on to the server (if necessary), navigate to the `\Omtool\OmtoolServer\Clients\FaxCenter` directory, and double-click **setup.exe**. The InstallShield Wizard for FaxCenter begins and displays the *Welcome* screen.
2. Click **Next**. The *License Agreement* screen appears.
3. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.
4. Click **Browse**, navigate to the location where you want to install FaxCenter, select the installation directory, click **OK**, and click **Next**. The *FaxCenter* screen appears.
5. Select the document management system your company uses from the *Document Management* drop-down list. If your company does not use a document management system, select **None**. Click **Next**. The *Start Copying Files* screen appears.
6. Review the installation settings and click **Next** to begin installing FaxCenter. The *InstallShield Wizard Complete* screen appears.
7. Click **Finish**. The installation is complete.

Testing the configuration

You can test the FaxCenter configuration by sending a fax to a destination inside your company.

Once you send the test fax, you can retrieve it in FaxCenter and route it to an e-mail account that you can access. Additionally, you can monitor these activities on the server using the Administrator.

Sending a test fax

Using the following procedure, you will send a test fax. Before you send the fax, you must consider the inbound routing rule you created for FaxCenter. The inbound fax will only be routed from the server to FaxCenter if the fax matches the criteria you specified in this routing rule. If necessary, you might need to modify this rule for the purposes of testing the fax. For example, if the routing rule specifies that all inbound faxes will be routed from the server to FaxCenter on Fridays only, you might need to modify this rule to include the day you are sending the test fax—unless you are sending the test fax on a Friday.

To send a test fax:

From any fax machine—including those inside your company, send a fax to a fax number in your company.

Tip: If you want to track the progress of the fax on the server, you can view the journal for that fax in the Administrator. The journal contains a log of events related to that fax.

Retrieving the test fax in FaxCenter

Using the following procedure, you will launch FaxCenter on the client system and locate the test fax in the New Items queue.

To locate the test fax:

1. Log on to the client system.
2. Click the **Start** button and select **Programs | FaxCenter | FaxCenter Console**. The *Connect to Server* dialog box appears.

3. Type the computer name or IP address of the server in the *Server* text box, type the e-mail address of the FaxCenter user in the *E-mail* text box, type the appropriate password for the FaxCenter user in the *Password* text box, and click **Connect**.
4. Click on the test fax in the New Items queue to view it in the page view pane.

Tip: If the test fax does not appear in the New Items queue, you can troubleshoot the fax from the Administrator. (See "Troubleshooting the test fax" on page 172.)

Note: Depending on the permissions you configured for the FaxCenter login account, you might only be able to view the first page of the fax or the entire fax.

Troubleshooting the test fax

You can troubleshoot the test fax by:

- tracking the status of the test fax on the server
- verifying the criteria defined in the inbound routing rule
- determining whether all FaxCenter users or specific FaxCenter users should have received the test fax

You'll find more information about each of these concepts in this section.

TRACKING THE STATUS OF THE FAX ON THE SERVER

You can track the progress of the test fax on the server using the Administrator. If the server did not route the inbound fax to FaxCenter, did not deliver the fax for another reason, or paused during the processing of the fax, you can view the journal for that fax and see a log of events related to that fax.

Once the server routes the test fax to FaxCenter, you can view the journal for that fax in FaxCenter.

To view the test fax on the server:

1. Start the Administrator.
2. Expand the *Messages* item in the console tree and select **In Process**.

The In Process folder displays all messages and faxes being processed on the server. In the details pane, the top section displays a set of bar graphs, also called barometers, that represent the different processing phases of a fax. You can resize the Administrator window if necessary to view all the barometers.

Each barometer has a number that indicates the number of items in that processing phase. As items move through various phases of processing, the visual indicators on the barometers change in real-time.

Using these barometers, you can locate the processing phase of your test fax and watch it move through the other phases until the server dispatches the fax to FaxCenter.

3. Click the option button above the barometer you want to view.

If you cannot locate your test fax in the In Process queue, repeat these steps in the History queue.

4. Right-click on the test fax and select **Properties**.
5. Click the **Journal** tab.

Review the list of events. (Double-click on an event if you want to view more information about it.) If the server did not route the inbound fax to FaxCenter, did not deliver the fax, or paused during the processing of the fax, the journal provides you with the information you need to troubleshoot the issue.

Tip: If you make any modifications to the settings on the server and you want to send your test fax again, you can resend the fax from the Administrator. For more information, refer to the Administrator help: <http://www.omtool.com/omtoolserver/v331/documentation/admin/index.htm>

CHECKING INBOUND ROUTING RULES

When you troubleshoot your test fax, make sure that you created an inbound routing rule for FaxCenter. (See "Creating routing rules for inbound faxes" on page 168.)

Also, verify that the details in this rule will route faxes to FaxCenter and that the appropriate FaxCenter users should receive faxes. If you configured the server to route faxes to all FaxCenter users, all FaxCenter users should be able to view the test

fax in the New Items queue. If you configured the server to route faxes to a particular FaxCenter user, only that user should be able to view the test fax in the New Items queue.

VERIFY THE INSTALLATION OF AN IMAGE VIEWER

If the client system has Windows XP, you need to install an image viewer. (See "Requirements" on page 164.) If the image viewer was not installed, you will not be able to view the test fax in FaxCenter.

Routing the test fax from FaxCenter to an e-mail account

Once you can view the test fax in FaxCenter, you should route it to an e-mail account that you can access. After you route the fax from FaxCenter to an e-mail account and retrieve the fax from the e-mail account, you will have simulated the steps that will occur when your company receives actual faxes.

Note: When a FaxCenter user routes an inbound fax, the user can route the fax to e-mail recipients, network printers, fax machines, and your company's document management system or document repository. However, you will route the test fax to an e-mail account because it will be easy for you to retrieve it. This also allows you to test the mail connector that moves faxes to your mail server for delivery.

Using the following procedure, you will open the test fax in FaxCenter and route it to an e-mail account that you can access.

To route the test fax to your e-mail account:

1. Start FaxCenter, log in, and click on the test fax in the New Items queue. (If the New Items queue does not appear, click View and select New Items.)
2. Click **Edit** and select **Route Item**. The *Route Selected Item* dialog box appears.
3. Select your e-mail address from the list on the left and click the **Add Recipient** button, or type your e-mail address in the *Type destination or select from list* text box and click the **Add** button.
4. In the *Pages to route* text box, indicate the pages you want to route by selecting **All Pages** from the drop-down menu or typing the page numbers in the text box.

5. Under *Routing Transaction Description*, type the name of the original sender in the *Name* text box, the original sender's company name in the *Company* text box, and your comments about the fax in the *Comments* text box.

Depending on the permissions you configured for the FaxCenter login account, you might have granted permissions for this user to leave the *Name* or *Company* fields empty.

6. Click **Route**. The server prepares and sends the fax to the destination you specified, and FaxCenter moves the fax to the Processed Items queue.
7. Log in to the e-mail account where you routed the test fax.
8. In your inbox, you should see a message indicating that a FaxCenter user has routed a fax to you. Follow the instructions in the e-mail to retrieve the test fax.

Genifax Desktop Client - Corporate Edition

The Genifax Desktop Client - Corporate Edition installs one or more of the following features:

- **Printer** - The Genifax printer converts documents into PDF attachments. When you print a document to the Genifax printer, it converts the document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.
- **Menu Items for Microsoft Outlook** - Three shortcuts are installed in Outlook: a **File menu | New | Genifax Message** shortcut, an **Actions menu | Genifax Message** shortcut, and a **New button | Genifax Message** shortcut. When you use one of these shortcuts, the appropriate Genifax form appears. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax. (This option was called Outlook Integration in previous versions of this application.)
- **Macros for Microsoft Office** - When you click on the Genifax macro button in Word, Excel, or PowerPoint, the Genifax printer converts the active document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.

Note: Microsoft Office macros have been signed by Omtool. When the digital certificate associated with these signatures expires, you can download new macros from the Omtool web site. To download new Office macros, visit <https://www.omtool.com/support/> and go to the downloads section.

Additionally, the Genifax Desktop Client - Corporate Edition includes the Start menu shortcut **Send a Genifax**. This is part of the default installation. When you select this item in the Start menu, your e-mail application starts and displays the appropriate Genifax form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.

Requirements

The system where you will install the Genifax Desktop Client - Corporate Edition must meet the following minimum requirements:

- Pentium®-class processor
- Windows® XP Professional/2000 with SP3 or later/98 SE
- 20 MB hard disk space
- 64 MB RAM (128 recommended)
- Microsoft® Outlook® 2003/2002/2000 or Notes 6.5/6.0/5.0 or another MAPI-based e-mail client
- Adobe® Acrobat® or Acrobat® Reader® 5.0 or later
- Microsoft® Office 2003/2002/2000 (required only if you want Office macros to be installed)
- Internet Explorer 6.0

Important! If Desktop Components v3.2.1 or earlier is installed on the client, uninstall this application before you continue. (Note that Desktop Components is the former name of the Genifax Desktop Client.)

Running the installation program

Note: The setup program for this application is located on the server in the `\Omtool\OmtoolServer\Clients\GenifaxDesktop` directory. You can run the setup from the server or the client. If you run the setup from the client, share the `\Omtool\OmtoolServer\Clients\GenifaxDesktop` directory on the server so that you can access it from the client, and map a drive on the client to the `\Omtool\OmtoolServer\Clients\GenifaxDesktop` directory on the server if necessary.

To run the installation program:

1. Log on to the server (if necessary), navigate to the `\Omtool\OmtoolServer\Clients\GenifaxDesktop` directory, and double-click **setup.exe**. The InstallShield Wizard launches and displays the *Welcome* screen.
2. Click **Next**. The *License Agreement* screen appears.

3. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.
4. Click **Browse**, navigate to the location where you want to install the Genifax Desktop, select the installation directory, click **OK**, and click **Next**. The *Select Features* screen appears.
5. Select the features you want to install:
 - **Printer** - The Genifax printer converts documents into PDF attachments. When you print a document to the Genifax printer, it converts the document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.
 - **Menu Items for Microsoft Outlook** - Three shortcuts are installed in Outlook: a **File menu | New | Genifax Message** shortcut, an **Actions menu | Genifax Message** shortcut, and a **New button | Genifax Message** shortcut. When you use one of these shortcuts, the appropriate Genifax form appears. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax. (This option was called Outlook Integration in previous versions of this application.)
 - **Macros for Microsoft Office** - When you click on the Genifax macro button in Word, Excel, or PowerPoint, the Genifax printer converts the active document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.

Note: Microsoft Office macros have been signed by Omttool. When the digital certificate associated with these signatures expires, you can download new macros from the Omttool web site. To download new Office macros, visit <https://www.omttool.com/support/> and go to the downloads section.

6. Click **Next**. The *Genifax Desktop Components* screen appears.

7. Select **Microsoft Outlook, Lotus Notes, Novell GroupWise** or **MAPI Client** as the e-mail application that you want the Genifax Desktop Client - Corporate Edition to support, and click **Next**. The *Start Copying Files* screen appears.
 8. Review the installation settings and click **Next** to begin installing the Genifax Desktop Client - Corporate Edition. The *InstallShield Wizard Complete* screen appears.
 9. Click **Finish** to restart your computer and complete the installation.
- You have completed the Genifax Desktop Client - Corporate Edition installation.

Important! Immediately after you install this client application in a Notes environment, the Genifax printer and Genifax Office macros cannot launch the Genifax Fax Memo form for Notes. Refer to Knowledge Base article K03081 for instructions on resolving this issue.

Performing a command line installation

In order to perform a command line installation of the Genifax Desktop Client - Corporate Edition, you need to:

1. Create an InstallShield settings file
2. Configure the installation settings in the silent.ini file
3. Install the application from a command line

These three procedures are detailed in this section.

Note: The command line installation is supported in Genifax v3.3.1 SRI and later.

Creating an InstallShield settings file

Using the following procedure, you will create an InstallShield settings file (setup.iss) for the command line installation. This process allows InstallShield to add information about the Genifax Desktop Client - Corporate Edition to your computer.

During this procedure, you will install the Genifax Desktop Client - Corporate Edition on your computer. Configure the installation appropriately for client systems

in your environment. All the information from this installation will be recorded in the InstallShield settings file, and should be consistent with the settings you will configure in the silent.ini file in the next section.

To create an InstallShield settings file:

1. Log on to the server if necessary and open a Windows command prompt.
2. Set the directory to the \Omtool\OmtoolServer\Clients\GenifaxDesktop directory on the server.

Tip: For help using the Windows command prompt, type `cd /?` and press **ENTER**.

3. Type `setup.exe /r /f1"[location of setup.iss file]"` and press **ENTER**. The InstallShield Wizard launches and displays the *Welcome* screen.

Note: Replace `[location of setup.iss file]` with the location of the `setup.iss` file in the `\Omtool\OmtoolServer\Clients\GenifaxDesktop` directory on the server.
For example: `setup.exe /r /f1"c:\Program Files\Omtool\OmtoolServer\GenifaxDesktop\setup.iss"`

4. Click **Next**. The *License Agreement* screen appears.
5. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.
6. Click **Browse**, navigate to the location where you want to install the Genifax Desktop - Corporate Edition, select the installation directory, click **OK**, and click **Next**. The *Select Features* screen appears.
7. Select the features you want to install:
 - **Printer** - The Genifax printer converts documents into PDF attachments. When you print a document to the Genifax printer, it converts the document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.

- **Menu Items for Microsoft Outlook** - Three shortcuts are installed in Outlook: a **File menu | New | Genifax Message** shortcut, an **Actions menu | Genifax Message** shortcut, and a **New button | Genifax Message** shortcut. When you use one of these shortcuts, the appropriate Genifax form appears. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax. (This option was called Outlook Integration in previous versions of this application.)
- **Macros for Microsoft Office** - When you click on the Genifax macro button in Word, Excel, or PowerPoint, the Genifax printer converts the active document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.

Note: Microsoft Office macros have been signed by Omtool. When the digital certificate associated with these signatures expires, you can download new macros from the Omtool web site. To download new Office macros, visit <https://www.omtool.com/support/> and go to the downloads section.

8. Click **Next**. The *Genifax Desktop Components* screen appears.
9. Select **Microsoft Outlook, Lotus Notes, Novell GroupWise** or **MAPI Client** as the e-mail application that you want the Genifax Desktop Client - Corporate Edition to support, and click **Next**. The *Start Copying Files* screen appears.
10. Review the installation settings and click **Next** to begin installing the Genifax Desktop Client - Corporate Edition. (If you need to make any changes to the installation settings, click the **Back** button until you find the screen with the settings you want to change. Then proceed through the appropriate steps to get to this point again.) The *InstallShield Wizard Complete* screen appears.
11. Click **Finish** to restart your computer and complete the installation.
12. Verify that the setup.iss file has been created in the `\Omtool\OmtoolServer\Clients\GenifaxDesktop` directory on the server.

Proceed to the next section.

Configuring the installation settings in the silent.ini file

Using the following procedure, you will modify the silent.ini file, a settings file that contains the configuration information for the command line installation. You can configure many settings, including the target installation directory for the command line installation, the e-mail system that the Genifax Desktop Client - Corporate Edition will support, features that will be installed, etc.

The installation settings in the silent.ini file should be the same settings as those you configured for the InstallShield settings file.

To configure the installation settings in the silent.ini file:

1. Navigate to the \Omtool\OmtoolServer\Clients\GenifaxDesktop directory on the server and open the silent.ini file in Notepad.
2. Edit the file using the instructions provided in the file.

Note: The feature that installs menu items for Microsoft Outlook is called **Outlook Integration in the silent.ini file.**

3. Save the silent.ini file and close it.

After you have completed all the steps listed above, proceed to the next section.

Installing the application from a command line

Using the following procedure, you will install the Genifax Desktop Client - Corporate Edition from a command line. The application will be installed using the settings in the setup.iss and the silent.ini files you created in the previous sections.

To install the Genifax Desktop Client - Corporate Edition from a command line:

1. Open a Windows command prompt.
2. Set the directory to the \Omtool\OmtoolServer\Clients\GenifaxDesktop directory on the server.

Tip: For help using the Windows command prompt, type `cd /?` and press **ENTER**.

3. Type `setup.exe /s /f1"[location of setup.iss]"` and press **ENTER**. During the installation, an InstallShield item appears briefly in the task bar, and then the computer restarts.

Note: Replace `[location of setup.iss file]` with the location of the setup.iss file in the `\Omtool\OmtoolServer\Clients\GenifaxDesktop` directory on the server.
For example: `c:\Program Files\Omtool\OmtoolServer\GenifaxDesktop\setup.iss`

4. Verify that the installation was successful. Open the Start menu and view the list of programs. You should see an item called "Send a Genifax".

You have completed the Genifax Desktop Client - Corporate Edition command line installation.

Important! Immediately after you install this client application in a Notes environment, the Genifax printer and Genifax Office macros cannot launch the Genifax Fax Memo form for Notes. Refer to Knowledge Base article K03081 for instructions on resolving this issue.

Genifax Desktop Client - Legal Edition

The Genifax Desktop Client - Legal Edition installs one or more of the following features:

- **Printer** - The Genifax printer converts documents into PDF attachments. When you print a document to the Genifax printer, it converts the document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.
- **Menu Items for Microsoft Outlook** - Three shortcuts are installed in Outlook: a **File menu | New | Genifax Message** shortcut, an **Actions menu | Genifax Message** shortcut, and a **New button | Genifax Message** shortcut. When you use one of these shortcuts, the appropriate Genifax form appears. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax. (This option was called Outlook Integration in previous versions of this application.)
- **Macros for Microsoft Office** - When you click on the Genifax macro button in Word, Excel, or PowerPoint, the Genifax printer converts the active document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.

Note: Microsoft Office macros have been signed by Omttool. When the digital certificate associated with these signatures expires, you can download new macros from the Omttool web site. To download new Office macros, visit <https://www.omttool.com/support/> and go to the downloads section.

- **DMS Support** - You can select a file from your company's document management system or document repository, and attach it to the Genifax form with a single click. (This functionality is available only when the Genifax Desktop Client - Legal Edition is used in conjunction with the Genifax forms.)
- **InterAction Support** - If your company uses InterAction contact management software, you can select recipients from your InterAction address book when you create faxes. (This functionality is available only when the Genifax Desktop Client - Legal Edition is used in conjunction with the Genifax forms.)

Additionally, the Genifax Desktop Client - Legal Edition includes the Start menu shortcut **Send a Genifax**. This is part of the default installation. When you select this item in the Start menu, your e-mail application starts and displays the appropriate Genifax form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.

Requirements

The system where you install the Genifax Desktop Client - Legal Edition must meet the following minimum requirements:

- Pentium®-class processor
- Windows® XP Professional/2000 with SP3 or later/98 SE
- 20 MB hard disk space
- 64 MB RAM (128 recommended)
- Microsoft® Outlook® 2003/2002/2000 or Notes 6.5/6.0/5.0 or another MAPI-based e-mail client
- Adobe® Acrobat® or Acrobat® Reader® 5.0 or later
- Microsoft® Office 2003/2002/2000 (required only if you want Office macros to be installed)
- Internet Explorer 6.0

Important! If Desktop Components LE v3.2.1 or earlier is installed on the client, uninstall this application before you continue. (Note that Desktop Components LE is the former name of the Genifax Desktop Client - Legal Edition.)

Additionally, the Genifax Desktop Client - Legal Edition supports the following client applications for document management systems and document repositories:

- Hummingbird® DM™ 5.1/5.0
- Hummingbird® DOCS Open® 3.9
- Hummingbird® PowerDOCS® 4.0
- iManage® InfoRite® 5.3
- Interwoven (iManage®) DeskSite™ 8.0/6.6/6.0.1
- Interwoven MailSite 8.0
- WORLDOX® 2000

Additionally, the Genifax Desktop Client - Legal Edition supports the following contact management software:

- InterAction® 5.1

Tip: Omtool provides release notes that include known issues, troubleshooting tips, and other important information regarding all applications associated with the server. You should review the release notes before installing and running the Genifax Desktop Client - Legal Edition. The release notes are available at:

<http://www.omtool.com/documentation/omtoolserver/ReleaseNotesGF331AR201.pdf>

Running the installation program

Note: The setup program for this application is located on the server in the `\Omtool\OmtoolServer\Clients\GenifaxDesktopLE` directory. You can run the setup from the server or the client. If you run the setup from the client, share the `\Omtool\OmtoolServer\Clients\GenifaxDesktopLE` directory on the server so that you can access it from the client, and map a drive on the client to the `\Omtool\OmtoolServer\Clients\GenifaxDesktopLE` directory on the server if necessary.

To run the installation program:

1. Log on to the server if necessary, navigate to the \Omtool\OmtoolServer\Clients\GenifaxDesktopLE directory, and double-click **setup.exe**. The InstallShield Wizard launches and displays the *Welcome* screen.
2. Click **Next**. The *License Agreement* screen appears.
3. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.
4. Click **Browse**, navigate to the location where you want to install the Genifax Desktop - Legal Edition, select the installation directory, click **OK**, and click **Next**. The *Select Features* screen appears.
5. Select the features you want to install:
 - **Printer** - The Genifax printer converts documents into PDF attachments. When you print a document to the Genifax printer, it converts the document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.
 - **Menu Items for Microsoft Outlook** - Three shortcuts are installed in Outlook: a **File menu | New | Genifax Message** shortcut, an **Actions menu | Genifax Message** shortcut, and a **New button | Genifax Message** shortcut. When you use one of these shortcuts, the appropriate Genifax form appears. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax. (This option was called Outlook Integration in previous versions of this application.)
 - **Macros for Microsoft Office** - When you click on the Genifax macro button in Word, Excel, or PowerPoint, the Genifax printer converts the active document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.

Note: Microsoft Office macros have been signed by Omtool. When the digital certificate associated with these signatures expires, you can download new macros from the Omtool web site. To download new Office macros, visit <https://www.omtool.com/support/> and go to the downloads section.

- **DMS Support** - You can select a file from your company's document management system or document repository, and attach it to the Genifax form with a single click. (This functionality is available only when the Genifax Desktop Client - Legal Edition is used in conjunction with the Genifax forms.)
 - **InterAction Support** - If your company uses InterAction contact management software, you can select recipients from your InterAction address book when you create faxes. (This functionality is available only when the Genifax Desktop Client - Legal Edition is used in conjunction with the Genifax forms.)
6. Click **Next**. The *Genifax Desktop Components* screen appears.
 7. Select **Microsoft Outlook, Lotus Notes, Novell GroupWise** or **MAPI Client** as the e-mail application that you want the Genifax Desktop Client - Legal Edition to support, and click **Next**.
 8. If you are installing DMS Support, the *Document Management System* screen appears. (If you are not installing DMS Support, skip this step.)
 - a. Select the name of your company's document management system from the *Document Management* drop-down list and click **Next**. The *Document Management System Options* screen appears. (If you're using PowerDOCS, select the DM option.)
 - b. Select the **Lookup - Import billing directly from the DMS** option if you want the Genifax form to import billing information from your company's document management system. Select the **Validation - Verify integrity of billing information** option if you want the Genifax form to verify that the client and matter fields in your company's document management system are populated. (If the fields are not populated in your company's document management system, the fax will fail.) Then select the **Required - Billing fields must contain data** option if you want to require all the billing fields to be populated. (If the billing fields on the form are not populated, the server fails the fax.) Click **Next**.

10. If you are installing InterAction Support, the *Document Management System Options* screen appears. (If you are not installing InterAction Support, skip this step.) Click **Browse**, navigate to the directory where InterAction has been installed, click **OK**, and click **Next**.
 11. Review the installation settings in the *Start Copying Files* screen and click **Next** to begin installing the Genifax Desktop Client - Legal Edition. (If you need to make any changes to the installation settings, click the **Back** button until you find the screen with the settings you want to change. Then proceed through the appropriate steps to get to this point again.) The *InstallShield Wizard Complete* screen appears.
 12. Click **Finish** to restart your computer and complete the installation.
- You have completed the Genifax Desktop Client - Legal Edition installation.

Important! Immediately after you install this client application in a Notes environment, the Genifax printer and Genifax Office macros cannot launch the Genifax Fax Memo form for Notes. Refer to Knowledge Base article K03081 for instructions on resolving this issue.

Performing a command line installation

In order to perform a command line installation of the Genifax Desktop Client - Legal Edition, you need to:

1. Create an InstallShield settings file
2. Configure the installation settings in the silent.ini file
3. Install the application from a command line

These three procedures are detailed in this section.

Creating an InstallShield settings file

Using the following procedure, you will create an InstallShield settings file (setup.iss) for the command line installation. This process allows InstallShield to add information about the Genifax Desktop Client - Legal Edition to your computer.

During this procedure, you will install the Genifax Desktop Client - Legal Edition on your computer. Configure the installation appropriately for client systems in your environment. All the information from this installation will be recorded in the InstallShield settings file, and should be consistent with the settings you will configure in the silent.ini file in the next section.

To create an InstallShield settings file:

1. Log on to the server if necessary and open a Windows command prompt.
2. Set the directory to the `\Omttool\OmttoolServer\Clients\GenifaxDesktopLE` directory on the server.

Tip: For help using the Windows command prompt, type `cd /?` and press **ENTER**.

3. Type `setup.exe /r /f1"[location of setup.iss file]"` and press **ENTER**. The InstallShield Wizard launches and displays the *Welcome* screen.

Note: Replace `[location of setup.iss file]` with the location of the setup.iss file in the `\Omttool\OmttoolServer\Clients\GenifaxDesktopLE` directory on the server. For example: `setup.exe /r /f1"c:\Program Files\Omttool\OmttoolServer\GenifaxDesktopLE\setup.iss"`

4. Click **Next**. The *License Agreement* screen appears.

5. Read the license agreement and click **Yes** if you agree to the terms. (Click **No** to exit the setup if you do not agree to the terms.) The *Choose Destination Location* screen appears.
6. Click **Browse**, navigate to the location where you want to install the Genifax Desktop - Legal Edition, select the installation directory, click **OK**, and click **Next**. The *Select Features* screen appears.
7. Select the features you want to install:
 - **Printer** - The Genifax printer converts documents into PDF attachments. When you print a document to the Genifax printer, it converts the document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.
 - **Menu Items for Microsoft Outlook** - Three shortcuts are installed in Outlook: a **File menu | New | Genifax Message** shortcut, an **Actions menu | Genifax Message** shortcut, and a **New button | Genifax Message** shortcut. When you use one of these shortcuts, the appropriate Genifax form appears. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax. (This option was called Outlook Integration in previous versions of this application.)
 - **Macros for Microsoft Office** - When you click on the Genifax macro button in Word, Excel, or PowerPoint, the Genifax printer converts the active document into a PDF file, launches the appropriate Genifax form (or the standard form or mail template associated with your e-mail application), and attaches the PDF file to the form. Then you can add fax recipients, attach more files if desired, provide comments for the cover page, and send your fax.

Note: Microsoft Office macros have been signed by Omttool. When the digital certificate associated with these signatures expires, you can download new macros from the Omttool web site. To download new Office macros, visit <https://www.omttool.com/support/> and go to the downloads section.

- **DMS Support** - You can select a file from your company's document management system or document repository, and attach it to the Genifax form with a single click. (This functionality is available only when the Genifax Desktop Client - Legal Edition is used in conjunction with the Genifax forms.)
 - **InterAction Support** - If your company uses InterAction contact management software, you can select recipients from your InterAction address book when you create faxes. (This functionality is available only when the Genifax Desktop Client - Legal Edition is used in conjunction with the Genifax forms.)
8. Click **Next**. The *Genifax Desktop Components* screen appears.
 9. Select **Microsoft Outlook, Lotus Notes, Novell GroupWise, or MAPI Client** as the e-mail application that you want the Genifax Desktop Client - Legal Edition to support, and click **Next**.
 10. If you are installing DMS Support, the *Document Management System* screen appears. (If you are not installing DMS Support, skip this step.)
 - a. Select the name of your company's document management system from the *Document Management* drop-down list and click **Next**. The *Document Management System Options* screen appears. (If you're using PowerDOCS, select the DM option.)
 - b. Select the **Lookup - Import billing directly from the DMS** option if you want the Genifax form to import billing information from your company's document management system. Select the **Validation - Verify integrity of billing information** option if you want the Genifax form to verify that the client and matter fields in your company's document management system are populated. (If the fields are not populated in your company's document management system, the fax will fail.) Then select the **Required - Billing fields must contain data** option if you want to require all the billing fields to be populated. (If the billing fields on the form are not populated, the server fails the fax.) Click **Next**.
 11. If you are installing InterAction Support, the *Document Management System Options* screen appears. (If you are not installing InterAction Support, skip this step.) Click **Browse**, navigate to the directory where InterAction has been installed, click **OK**, and click **Next**. The *Start Copying Files* screen appears.

12. Review the installation settings and click **Next** to begin installing the Genifax Desktop Client - Legal Edition. (If you need to make any changes to the installation settings, click the **Back** button until you find the screen with the settings you want to change. Then proceed through the appropriate steps to get to this point again.) The *InstallShield Wizard Complete* screen appears.
13. Click **Finish** to restart your computer and complete the installation.
14. Verify that the setup.iss file has been created in the
 \Omtool\OmtoolServer\Clients\GenifaxDesktopLE directory on the server.

Proceed to the next section.

Configuring the installation settings in the silent.ini file

Using the following procedure, you will modify the silent.ini file, a settings file that contains the configuration information for the command line installation. You can configure many settings, including the target installation directory for the command line installation, the e-mail system that the Genifax Desktop Client - Legal Edition will support, the document management system that the Genifax Desktop Client - Legal Edition will support (if applicable), special options pertaining to document management system support (if applicable), the name and location of your company's address book (if applicable), features that will be installed, etc.

The installation settings in the silent.ini file should be the same settings as those you configured for the InstallShield settings file.

To configure the installation settings in the silent.ini file:

1. Navigate to the \Omtool\OmtoolServer\Clients\GenifaxDesktopLE directory on the server and open the silent.ini file in Notepad.
2. Edit the file using the instructions provided in the file.

Note: The feature that installs menu items for Microsoft Outlook is called **Outlook Integration in the silent.ini file.**

3. Save the silent.ini file and close it.

After you have completed all the steps listed above, proceed to the next section.

Installing the application from a command line

Using the following procedure, you will install the Genifax Desktop Client - Legal Edition from a command line. The application will be installed using the settings in the setup.iss and the silent.ini files you created in the previous sections.

To install the Genifax Desktop Client - Legal Edition from a command line:

1. Open a Windows command prompt.
2. Set the directory to the \Omtool\OmtoolServer\Clients\GenifaxDesktopLE directory on the server.

Tip: For help using the Windows command prompt, type `cd /?` and press **ENTER**.

3. Type `setup.exe /s /f1"[location of setup.iss]"` and press **ENTER**. During the installation, an InstallShield item appears briefly in the task bar, and then the computer restarts.

Note: Replace `[location of setup.iss file]` with the location of the `setup.iss` file in the `\Omtool\OmtoolServer\Clients\GenifaxDesktopLE` directory on the server. For example: `c:\Program Files\Omtool\OmtoolServer\GenifaxDesktopLE\setup.iss`

4. Verify that the installation was successful. Open the Start menu and view the list of programs. You should see an item called "Send a Genifax".

You have completed the Genifax Desktop Client - Legal Edition command line installation.

Important! Immediately after you install this client application in a Notes environment, the Genifax printer and Genifax Office macros cannot launch the Genifax Fax Memo form for Notes. Refer to Knowledge Base article **K03081** for instructions on resolving this issue.

Appendix A: Removing fax board drivers

In this chapter...

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- "Removing 4.6 drivers" on page 198
- "Removing 4.3 drivers" on page 199

Removing 4.7 drivers

If you previously install Brooktrout 4.7 drivers (for TR1034 series boards), you need to remove these drivers in several steps:

- remove the drivers using the Add/Remove Programs applet
- remove the device from the Device Manager in Windows
- delete the INF and PNF Brooktrout data files in the \WINNT\inf directory
- delete the \Boston directory

To remove the drivers using the Add/Remove Programs applet:

1. Start the Add/Remove Programs applet in the Control Panel.
2. Locate **Brooktrout TrxStream Drivers** and remove this item. (For more information on using the Add/Remove Programs applet, consult Windows help.)

To remove the device from the Device Manager:

1. Launch the Computer Management applet. Right-click the server on the desktop and select **Manage**. The Component Management applet starts.
2. Expand *System Tools* and select **Device Manager** in the console tree.
3. Expand the *computer name* in the details pane if necessary to view the devices installed on the server, and expand *Brooktrout Hardware*.
4. Right-click **TRxStream Board** and select **Uninstall**.
5. Click **OK** on the *Confirm Device Removal* dialog box.

To delete the INF and PNF Brooktrout data files in the \WINNT directory:

Important! This procedure instructs you to delete a pair of INF and PNF files. Follow the procedure carefully and do not delete any other files on the system with similar filenames.

1. Navigate to the c:\WINNT\inf directory.

2. Right-click the \inf directory and select **Search**. Type **brooktrout** in the *Containing text* text box and click **Search Now**.
3. Sort the files by name and locate the oem#.inf and oem#.pnf files. (The symbol # represents a number. For example, if this number is 6 on your system, the filenames should be oem6.inf and oem6.pnf.)
4. Verify that the two files have the same name but different extensions, and are located in the \WINNT\inf directory.
5. Delete the oem#.inf and oem#.pnf files.

To delete the \Boston directory:

1. Navigate to the \Boston directory on the modem server. (Search for the directory if necessary.)
2. Delete the directory.

You have removed the Brooktrout v4.7 drivers from the system.

Removing 4.6 drivers

To remove version 4.6 drivers (used with TRI034 series boards):

1. Open a Windows command prompt.
2. Type `cd \Boston\Install` and press **ENTER**.
3. Type `net stop boston` and press **ENTER**.
4. Type `install -r` and press **ENTER**.
5. Close the Command Prompt window.
6. Remove the fax board drivers using the Add/Remove Programs applet in the Control Panel.

Removing 4.3 drivers

To remove version 4.3 drivers (used with TR114 and TruFax series boards):

1. Open a Windows command prompt.
2. Type `cd \BFax\Install` and press **ENTER**.
3. Type `net stop bfax` and press **ENTER**.
4. Type `install -r` and press **ENTER**.
5. If you have a T1 line with ISDN support, remove the BTNA service:
 Type `cd. . \Server` and press **ENTER**.
 Type `btnasrv -remove` and press **ENTER**.
6. Close the Command Prompt window.
7. Remove the fax board drivers using the Add/Remove Programs applet in the Control Panel.

