

RightFax Connector for SharePoint 2007

Version 2.0

Administrator's Guide



Edition

Information in this document applies to version 2.0 of the RightFax Connector for SharePoint 2007 Administrator's Guide.

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Chapter 1—Overview of Features

With the RIGHTFAX CONNECTOR FOR SHAREPOINT 2007, you can:

- Send and receive faxes through Document Libraries without the RightFax client application being installed on the client machine.
- Make subscriptions to Document Libraries by configuring fax import-and-send settings and specifying grouping options.
- RightFax or Windows NT authentication.
- Comprehensive error logging via the RFMOSS event viewer on the RightFax server, or text files in the SharePoint Logs directory.
- Turn the Connector on or off by enabling or disabling all site collections from the Central Administration, or per site collection.
- Seamless integration with SharePoint 2007, following standards of the default SharePoint settings.

Chapter 2—Upgrading from an Older Version

This chapter explains what to do if you have an existing version of the RightFax Connector for SharePoint 2007. If you are performing a fresh install (you do not have an existing copy of the Connector on your computer), then skip this chapter and proceed to “Chapter 3—Installing the RIGHTFAX CONNECTOR FOR SHAREPOINT 2007” on page 7.

Removing the Existing Connector from the RightFax Server

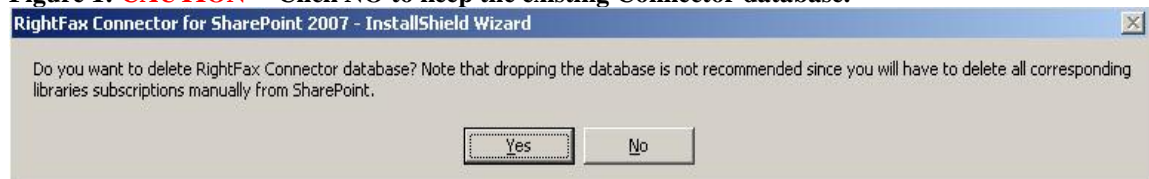
CAUTION: When you remove the existing Connector software, do NOT remove the existing Connector database. See Step 7 of this procedure.

1. On the RightFax server, open **Add/Remove Programs**.
2. Click **RightFax Connector for SharePoint 2007 > Change/Remove**.
The InstallShield Wizard opens.
3. Follow the prompts.
4. At the **Modify, repair, or remove the program** screen, click **Remove**.
5. At the prompt **Do you want to completely remove the selected application and all of its features?**, click **Yes**.
6. At the prompt **Do you want to delete settings?**, click **No**.

Note: This prompt appears only if you are upgrading from an environment in which both the RightFax and SharePoint components of the Connector are installed on the same physical computer. (Captaris does not support such a “single computer” configuration.) If you are using separate computers for the RightFax and SharePoint servers, then you will not see this prompt. For information on this “single computer” configuration issue, see “Installation Prerequisites” on page 7.

7. At the prompt **Do you want to delete the RightFax Connector database?**, click **No** (Figure 1).

Figure 1: CAUTION -- Click NO to keep the existing Connector database.



8. When removal of the application is complete, continue with “Removing the Existing Connector from the SharePoint Server” on page 6.

Removing the Existing Connector from the SharePoint Server

1. On the SharePoint server, open **Add/Remove Programs**.
2. Click **RightFax Connector for SharePoint 2007 > Change/Remove**.
The InstallShield Wizard opens.
3. Follow the prompts.
4. At the **Modify, repair, or remove the program** screen, click **Remove**.
5. At the prompt **Do you want to completely remove the selected application and all of its features?**, click **Yes**.
6. At the prompt **Do you want to delete settings?**, click **No**.
7. When removal of the application is complete, continue with “Chapter 3—Installing the RIGHTFAX CONNECTOR FOR SHAREPOINT 2007” on page 7.

Chapter 3—Installing the RIGHTFAX CONNECTOR FOR SHAREPOINT 2007

Installation Prerequisites

RightFax Server prerequisites:

- Microsoft Windows Server 2003
- Access to an SQL Server 2005 database
- Administrator privilege on the local machine
- Microsoft .NET Framework 3.0
- RightFax Server version 9.3 and most current Service Release or Feature Packs
- English Only Support

SharePoint Server prerequisites:

- Microsoft Windows Server 2003
- IIS 6.0
- Administrator privilege on the local machine
- Microsoft .NET Framework 3.0
- Microsoft Office SharePoint Server 2007 with most recent updates
- English Only Support

Configuration prerequisites:

The RightFax Connector for SharePoint 2007 deploys two distinct pieces of software: one that you install on the RightFax server to communicate with SharePoint, and one that you install on the SharePoint server to communicate with RightFax.

CAUTION: You must install RightFax and SharePoint on different physical computers. Captaris does not support any configuration in which both products, or both pieces of the Connector software, are on the same computer.

Some of our customers have deployed a "single computer" configuration for testing, demonstrations, etc. in the past. Accordingly, "Chapter 2—Upgrading from an Older Version" (page 5) makes special note of steps to take to remove our software in a "single computer" configuration.

Despite this acknowledge that such configurations might well exist among our customers, Captaris recommends that you use the RightFax Connector for SharePoint 2007 only in a "dual computer" configuration. We do not support the "single computer" configuration.

Installing in a Shared Services (“Collective”) Environment

For information on installing in a cluster, see “Installing in a Cluster Environment” on page 11.

Deployment prerequisites

- Domain Server: Microsoft Windows Server 2003 with Active Directory
- Database Server : Microsoft Windows Server 2003 with SQL 2005
- RightFax Collective: two servers running Microsoft Windows Server 2003 with RightFax in collective mode using the Database Server as a shared database and Data Sharing Configured from the Server Module service
- Single MOSS Server:
 - Microsoft Windows Server 2003
 - SQL 2005
 - Microsoft Office SharePoint Server 2007

—OR—

- MOSS Medium Farm:
 - SQL Server
 - Application Server
 - Two Web Front Ends

Note: If you use a MOSS medium farm, install the RFMOSS on all the SharePoint servers (Application server and Web Front End servers).

Note: Configure all servers to connect to the same domain.

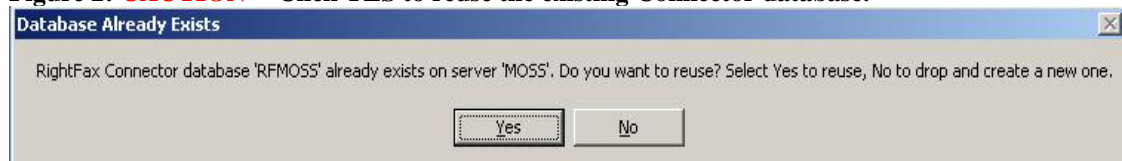
To install in a collective environment:

1. Install the RFMOSS on the MOSS Server/Farm (see “Chapter 3—Installing the RIGHTFAX CONNECTOR FOR SHAREPOINT 2007” on page 7).
2. In the first node of the RightFax collective, run the RFMOSS setup in the same way as with a single RightFax server.
3. In the second node, run the RFMOSS setup.

Note: If you are upgrading from an existing Connector, you kept the existing database in Step 7 of the procedure “Removing the Existing Connector from the RightFax Server” (page 5). In that scenario, you will see the prompt shown in Figure 4.

4. At the prompt **RightFax Connector database '<DatabaseName>' already exists on server '<ServerName>'**, click **Yes** (Figure 4).

Figure 2: CAUTION -- Click YES to reuse the existing Connector database.

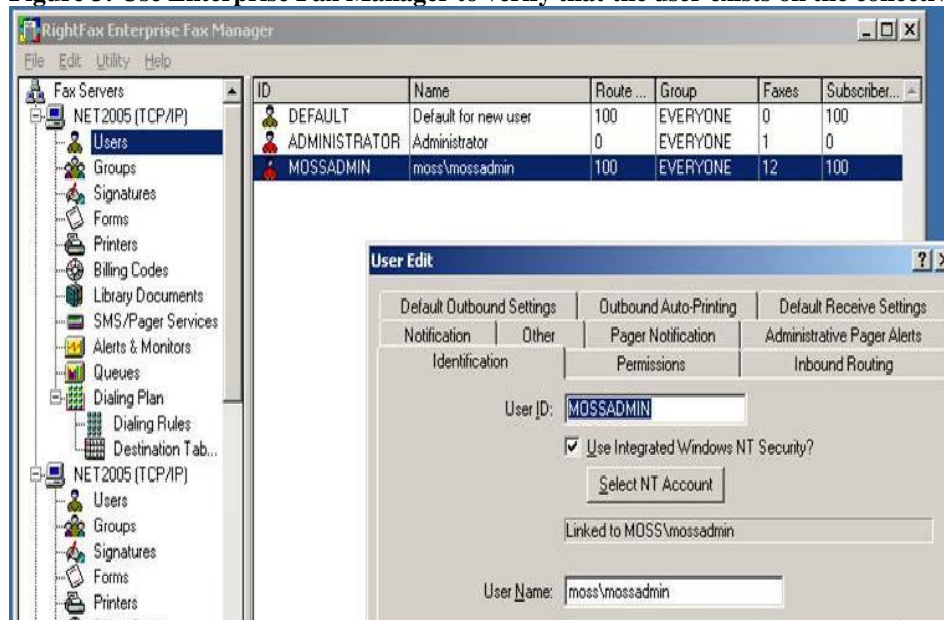


CAUTION: If you choose **No** (and create a new database), the old database will be deleted and the collective will use the new one.

5. Verify that the *RightFax Connector for SharePoint 2007* service is running on both servers.
6. From SharePoint Central Administration, create a server configuration for each RightFax server in the collective.

7. In SharePoint, create two fax libraries: one to import from the first node in the collective; and one to import from the second node.
8. In RightFax Enterprise Fax Manager, in the relevant server tree, click **Users**, and then verify that the user that you configured for this library exists (Figure 3).

Figure 3: Use Enterprise Fax Manager to verify that the user exists on the collective.



9. Test the collective by sending faxes from FaxUtil on one of the nodes, and observing how the faxes are imported into the fax library.

To configure a SharePoint Library for redundancy:

1. Install the RFMOSS connector on each node of the collective.
2. Create a server in SharePoint operations for the load balancer virtual server.
3. Create a document library that use the load balancer virtual server.

Installing in a Cluster Environment

For information on installing in a collective, see “Installing in a Shared Services (“Collective”) Environment” on page 8.

Deployment Prerequisites

- Domain Server: Microsoft Windows Server 2003 with Active Directory
- Database Server: Microsoft Windows Server 2003 with SQL 2005
- RightFax Collective: two servers running Microsoft Windows Server 2003 with RightFax in cluster mode using the Database Server as a shared database and the Win Cluster Quorum Disk for Data Sharing Configured from the Server Module service
- Single MOSS Server:
 - Microsoft Windows Server 2003
 - SQL 2005
 - Microsoft Office SharePoint Server 2007

—OR—

- MOSS Medium Farm:
 - SQL Server
 - Application Server
 - Two Web Front Ends

Note: If you use a MOSS medium farm, install the RFMOSS on all the SharePoint servers (Application server and Web Front End servers).

Note: Configure all servers to connect to the same domain.

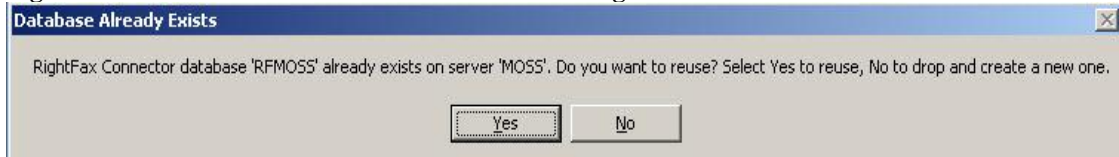
To install in a cluster environment:

1. Install the RFMOSS on the MOSS Server/Farm (see “Installing the RightFax Package” on page 13).
2. In the first node of the RightFax collective, run the RFMOSS setup in the same way as with a single RightFax server.
3. In the second node, run the RFMOSS setup.

Note: If you are upgrading from an existing Connector, you kept the existing database in step 7 of the procedure “Removing the Existing Connector from the RightFax Server” (page 5). In that scenario, you will see the prompt shown in Figure 4.

- At the prompt **RightFax Connector database '<DatabaseName>' already exists on server '<ServerName>'**, click **Yes** (Figure 4).

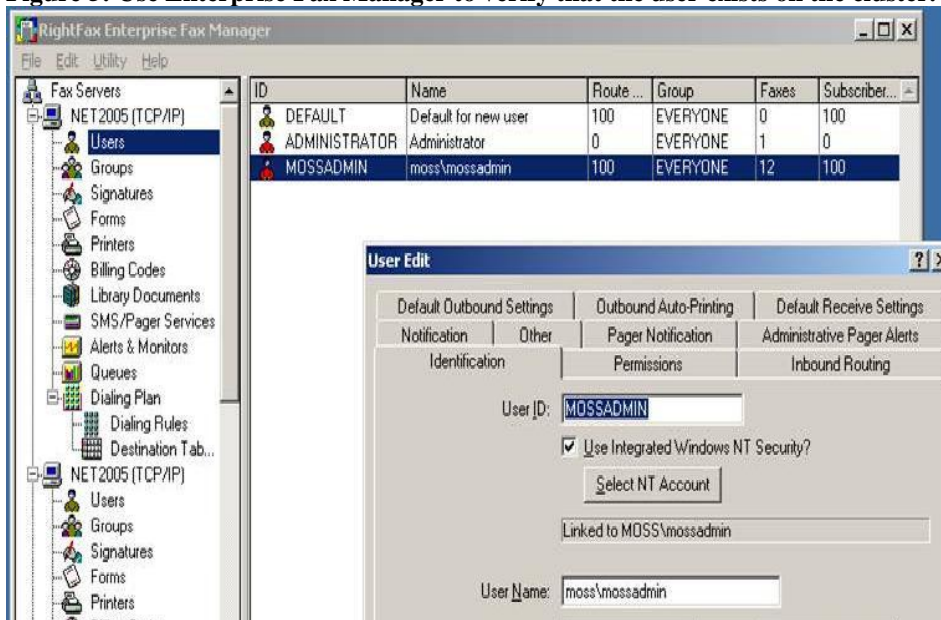
Figure 4: CAUTION -- Click YES to reuse the existing Connector database.



CAUTION: If you choose **No** (and create a new database), the old database will be deleted and both clusters will use the new one.

- In Cluster Administrator, add a new **Generic** service resource for the **RightFax Connector for SharePoint 2007** service.
- Verify that the **RightFax Connector for SharePoint 2007** service is running on the active cluster node.
- In SharePoint Central Administration, create a server configuration for the **Virtual Cluster Server**.
- In SharePoint, create a Fax Library, and configure it to import from the **Virtual Cluster Server**.
- In RightFax Enterprise Fax Manager, in the relevant server tree, click **Users**, and then verify that the user that you configured for this library exists (Figure 5).

Figure 5: Use Enterprise Fax Manager to verify that the user exists on the cluster.

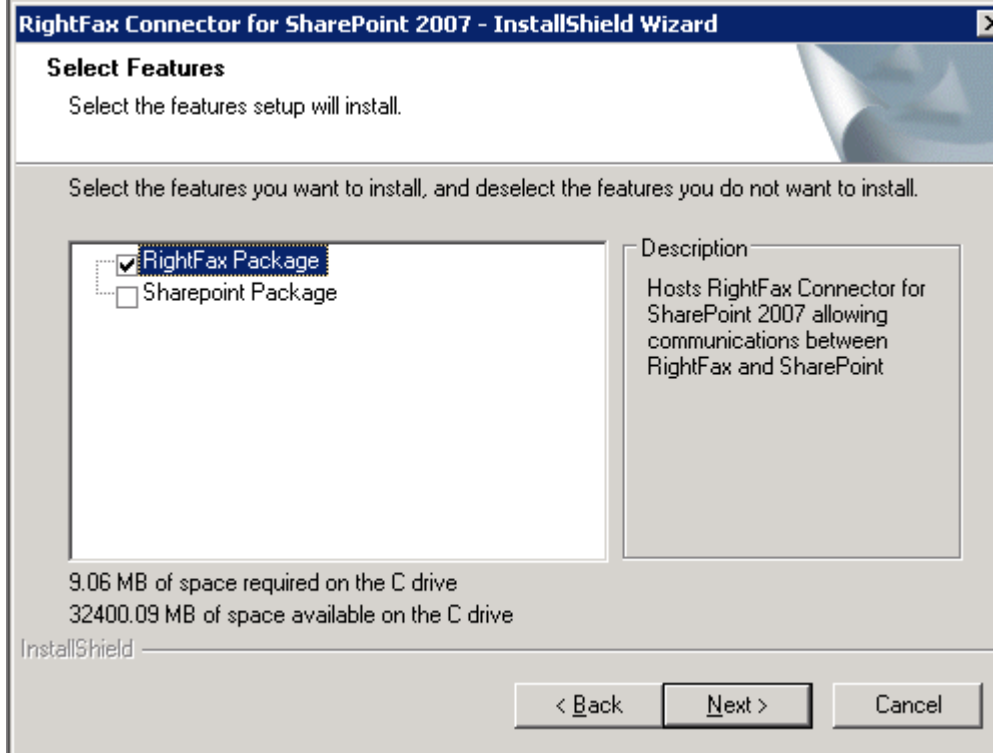


- Test the cluster by sending faxes from FaxUtil on the active node, and observing how the faxes are imported into the fax library.

Installing the RightFax Package

1. To launch the installation program, open the **Setup** file.
The **RightFax Connector for SharePoint 2007 InstallShield Wizard** opens.
2. Follow the on-screen prompts.
3. At the **Select Features** screen (Figure 6), select **RightFax Package**, and click **Next**.

Figure 6: Installing the RightFax components

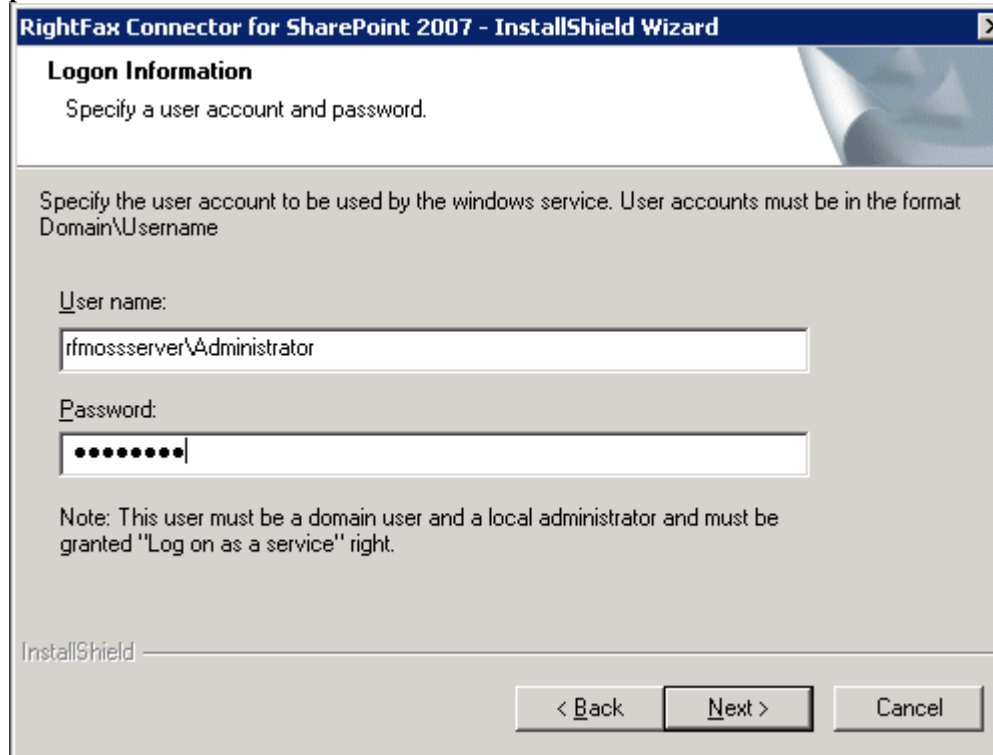


4. At the **Logon Information** screen (Figure 7), enter a **User name** that is a domain user and local administrator on the RightFax computer.

Note: This user also must have “log on as a service” permissions on the RightFax server. For instructions on how to grant these permissions, see “*Giving the RightFax Administrative User ‘Log On as a Service’ Permissions*” on page 16.

5. Enter a **Password** for this user, and click **Next**.

Figure 7: The user account must be a domain user and local administrator with “log on as a service” permissions



The screenshot shows a Windows-style dialog box titled "RightFax Connector for SharePoint 2007 - InstallShield Wizard". The main heading is "Logon Information" with the instruction "Specify a user account and password." Below this, a note states: "Specify the user account to be used by the windows service. User accounts must be in the format Domain\Username". There are two input fields: "User name:" containing "rfmossserver\Administrator" and "Password:" containing a series of dots. A note at the bottom reads: "Note: This user must be a domain user and a local administrator and must be granted 'Log on as a service' right." At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner.

6. At the **SQL Server** screen (Figure 8), select either **Windows** or **SQL Server** authentication to provide the credentials for accessing the SQL database.
 - **Windows authentication** – This user has to be a domain account with permissions in SQL. It does not have to be the same user that starts the service.
 - **SQL Server authentication** – uses the credentials that you supply on this screen in the Login ID and Password fields.

Figure 8: Provide credentials to access the database

RightFax Connector for SharePoint 2007 - InstallShield Wizard

SQL Server
Select authentication method

Specify the account that will be used by the windows service to access the database:

Connect using:

- Windows authentication (Service account provided in the previous page will be used)
- SQL Server authentication using the Login ID and password below

Login ID:

Password:

InstallShield

< Back Next > Cancel

7. Continue following the on-screen prompts to finish the installation.

Installing the SharePoint Package

- Repeat the steps described in “Installing the RightFax Package” (page 13) except, at the **Select Features** screen, select **SharePoint Package**.

No credentials will be required during this installation phase.

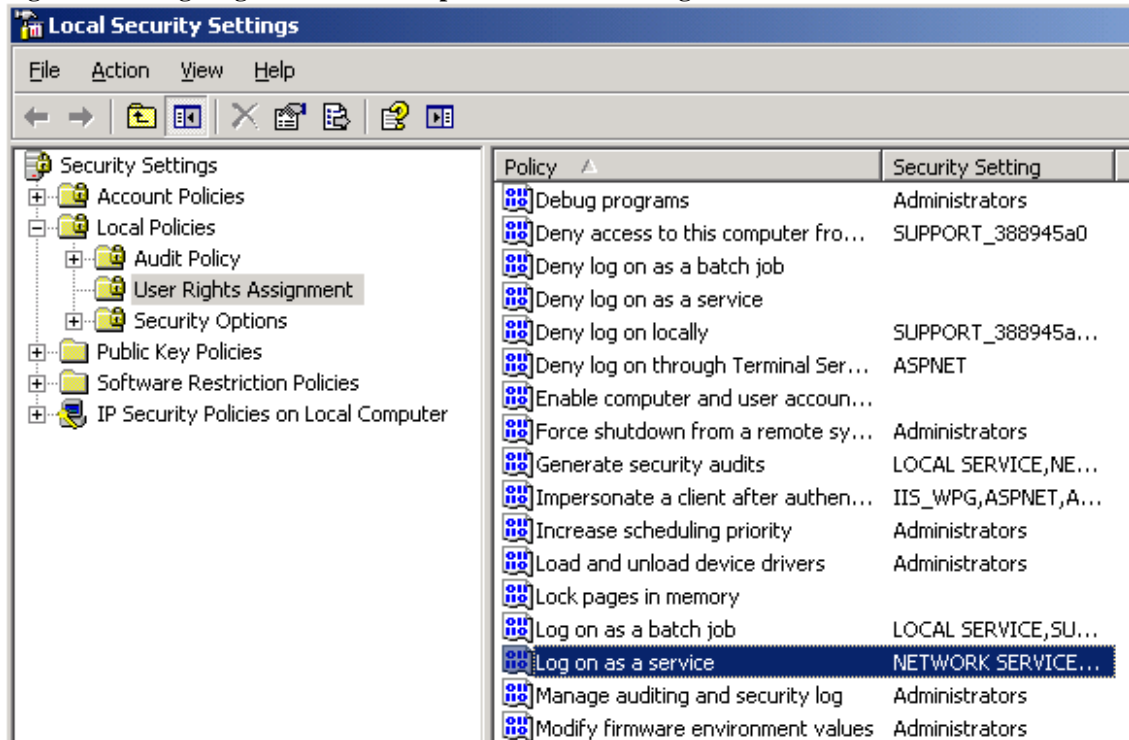
Giving the RightFax Administrative User 'Log On as a Service' Permissions

Step 4 of "Installing the RightFax Package" (page 13) requires you to identify an administrative account for the RightFax server. This account must have "log on as a service" permissions. The current procedure describes how to give such permissions.

1. On the RightFax server computer, click **Start > Administrative Tools > Local Security Settings**.

The **Local Security Settings** window opens (Figure 9).

Figure 9: Giving "log on as a service" permissions to the RightFax administrative account



2. In the left pane, expand **Local Policies** and select **User Rights Assignment**.
3. In the right pane, double-click **Log on as a service**.
4. In the resulting dialog box, enter the user name that you want to use for the service (the name that you entered in Step 4 of "Installing the RightFax Package" on page 13.)

Chapter 4—Administering the RIGHTFAX CONNECTOR FOR SHAREPOINT 2007

Connecting to a RightFax Server

1. From the SharePoint Central Administration, click the **Operations** tab, and then **RightFax Servers/Incoming Fax/Outgoing Fax Settings**.

The **RightFax Servers/Incoming Fax/Outgoing Fax Settings** page opens (Figure 10).

Figure 10: Managing Servers and Schedules

2. In the **Servers** area, click **Add**.
A new area opens, with configurable options for the RightFax server.
3. Enter information for the **Friendly Name**, **Server/IP**, **Port** (default is 9000), and **UPN Identity** (the same domain user as the one you entered in Step 4 of “Installing the RightFax Package” on page 13.)
4. Click **Apply**.
The friendly name now appears in the list.

Scheduling the Fax Receiver and Sender Services

Two timer jobs automatically run when you install the RIGHTFAX CONNECTOR FOR SHAREPOINT 2007: the Fax Receiver Service and the Fax Sender Service. By default, they are configured to run every 5 minutes.

You can modify this schedule by specifying the time interval for these services to run. These schedules impact the frequency of importing and sending faxes to and from RightFax and within the subscribed Document Libraries.

To change the schedule:

- In the **Timer Jobs Schedule** area, enter the desired number of minutes for the **Receiver** and **Sender** services, and then click **Save**.

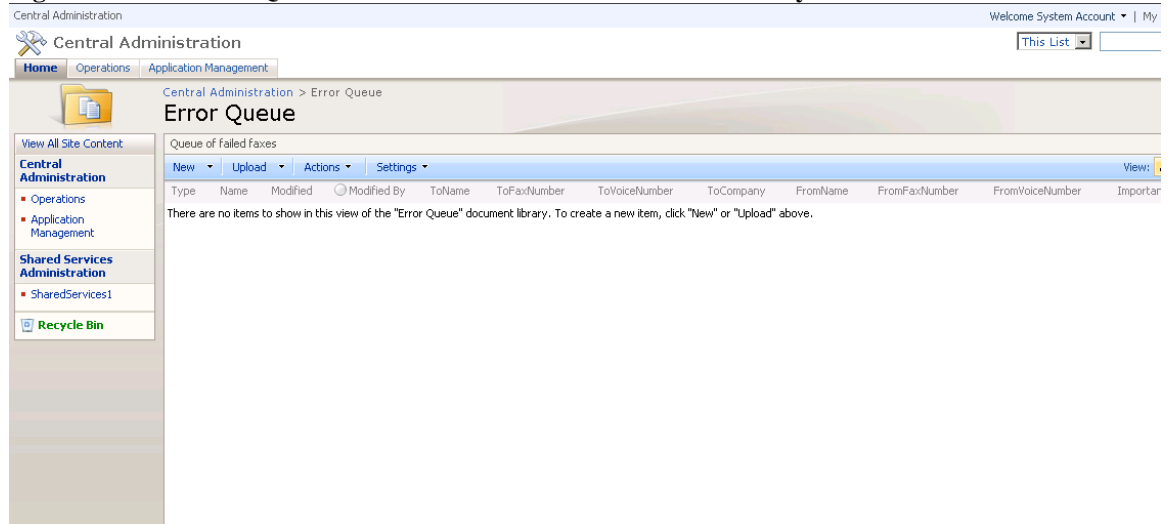
Monitoring the Error Queue and Correcting In-Error Faxes

The error queue is a Document Library that contains all faxes that were not sent successfully. On a scheduled basis that you can configure, the Fax Sender Service monitors the error queue and attempts to resend in-error faxes. You can use the error queue to monitor and correct problem faxes manually, too.

1. From the the SharePoint Central Administration home page, click **View All Site Content**, and then **Error Queue**.

The **Error Queue** page opens (Figure 11).

Figure 11: The Error Queue shows faxes that did not send successfully



2. To attempt to correct an in-error fax, right-click the item and select **Edit Properties**.

Managing Subscriptions

Manage Subscriptions is a list that shows all subscriptions in the Farm. Each item in the list corresponds to a subscription. The item properties contain information about the subscription, including Subscribing Library Title, URL, the subscription type (which can be either Server or Library), and the Subscription Name.

1. From the the SharePoint Central Administration home page, click **View All Site Content**, and then **Manage Subscriptions**.

The **Manage Subscriptions** page opens (Figure 12).

Figure 12: The Manage Subscriptions page shows all subscriptions in the Farm

Title	Library Title	Library ID	Library URL	Subscription Type	Publisher Name	Subscription ID
Fax Library-715f3ac8-6c11-4af7-9eaa-08f6644e59e1 <small>NEW</small>	Fax Library	715f3ac8-6c11-4af7-9eaa-08f6644e59e1	http://mosss:44314/MyFaxSite/FaxLibrary/Forms/AllItems.aspx	Server	RightFaxServer	ebceb627-3a903-96672

2. To cancel a subscription, delete the item from the list.

Note: A best practice for removing subscriptions would be to delete the doc library as opposed to deleting the subscription. Removing the subscription should be done only if it is a problem. In that case, select **Delete/Remove** from the item's drop-down list.

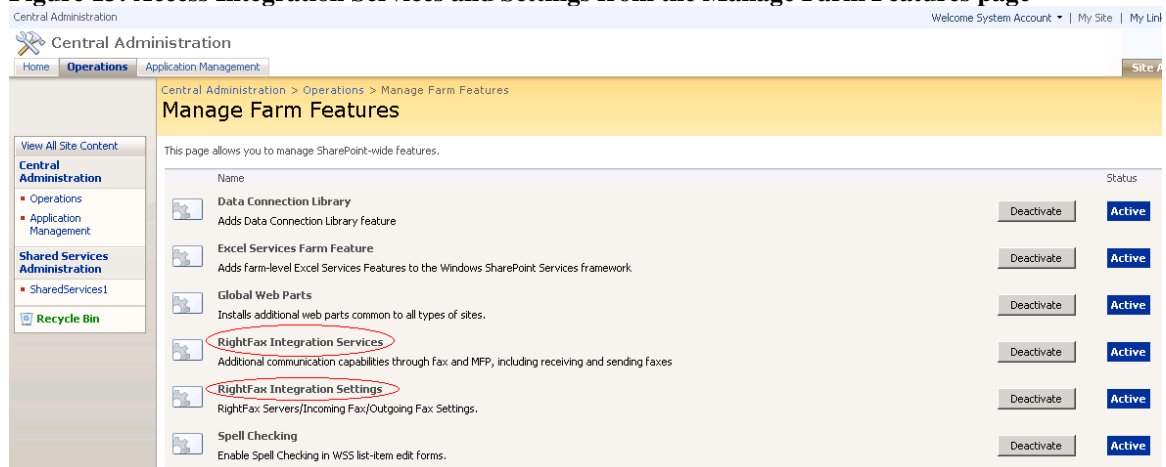
Managing Farm Features

Installing the Connector adds two farm features:

- **RightFax Integration Services** – allows for additional communication capabilities through fax and MFP, including receiving and sending faxes.
 - **RightFax Integration Settings** – used for RightFax Servers/Incoming Fax/Outgoing Fax Settings.
1. From the SharePoint Central Administration home page, click the **Operations** tab, and then **Manage Farm Features**.

The **Manage Farm Features** page opens (Figure 13).

Figure 13: Access Integration Services and Settings from the Manage Farm Features page



2. Select **RightFax Integration Services** or **RightFax Integration Settings** to make changes those two elements.

Monitoring Timer Job Status

To serve fax import and export features, the Connector creates two timer jobs:

FaxSenderService – responsible for sending faxes; checks every defined period for any failed-to-send faxes in the error queue, and then tries to resend them.

FaxReceiverService – responsible for importing faxes; checks every defined period for new faxes in the RFMOSS database; if it finds any, it routes them to their corresponding subscribed libraries.

Note: To define the periods at which the two services look for sent or received faxes, see “Scheduling the Fax Receiver and Sender Services” on page 17.

- To see the status of these timer jobs, from the SharePoint Central Administration home page, click **Operations**, and then **Timer Job Status**.

FaxReceiverService and **FaxSenderService** are among the job titles in the timer job status list (Figure 14).

Figure 14: Monitoring timer job status

Job Title	Server	Status	Progress	Started
Application Server Administration Service Timer Job	MOSS5	Succeeded	100%	11/7/2007 3:29 PM
Application Server Timer Job	MOSS5	Succeeded	100%	11/7/2007 3:29 PM
Child farm content source discovery	MOSS5	Succeeded	100%	11/7/2007 3:15 PM
Config Refresh	MOSS5	Succeeded	100%	11/7/2007 3:29 PM
FaxReceiverService	MOSS5	Succeeded	100%	11/7/2007 3:28 PM
FaxSenderService	MOSS5	Succeeded	100%	11/7/2007 3:29 PM
Immediate Alerts	MOSS5	Succeeded	100%	11/7/2007 3:25 PM
Immediate Alerts	MOSS5	Succeeded	100%	11/7/2007 3:25 PM
Indexing Schedule Manager on MOSS5	MOSS5	Succeeded	100%	11/7/2007 3:29 PM

Activating and Deactivating Site Collection Features

Two features are installed on each site collection in the farm where the Connector was installed:

- Captaris RightFax Import Features** – Activating this feature will enable the Fax Import Settings on the Document Libraries of this site collection and eventually allows the subscription to RightFax or another Library to import faxes.
- Captaris RightFax Sending Features** – Activating this feature will enable the Fax Sending Settings on the Document Libraries of this site collection and eventually allows sending faxes to RightFax .

You must activate these features; they are not active by default. When these features are activated, the content type *Paper* is added on each site in the site collection. Users will then be able to send, receive, manage, and preview faxes once a subscription is made.

To activate or deactivate a feature:

- Open the Site Settings for the desired site collection.
- In the **Site Collection Administration** area, click **Site collection features**.
- In the features list, click **Activate** or **Deactive**, as desired.

Chapter 5—Using the RIGHTFAX CONNECTOR FOR SHAREPOINT 2007

Creating a New Fax Library from a Template

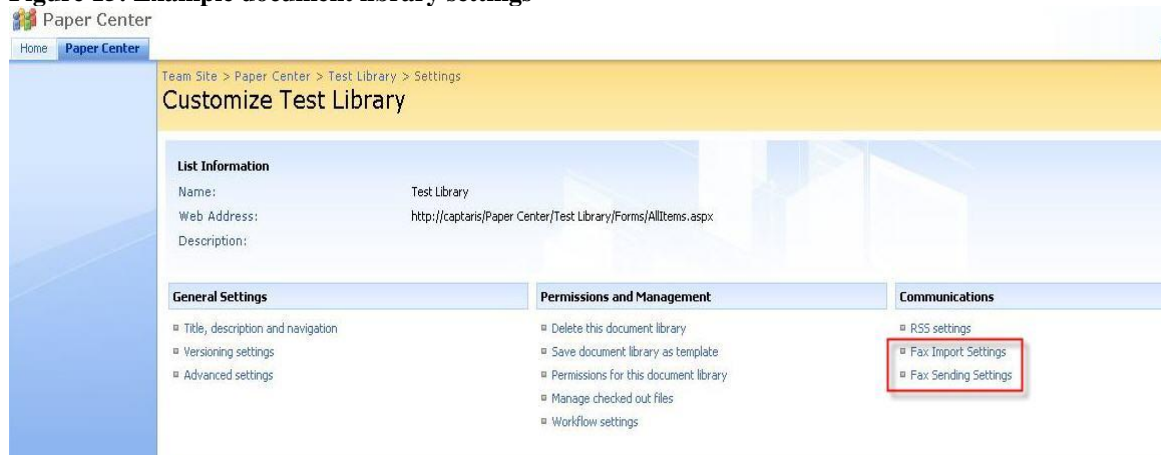
Creating a new library from this template results in a document library with the content type *Paper* added by default and the essential *Paper* properties, *Fax Metadata*, added.

1. From the site **Actions** menu, click **Create**.
2. In the **Libraries** area, click **Fax Library**.

Accessing Fax Import and Send Settings

The Connector adds two links to the document library settings: **Fax Import Settings** and **Fax Sending Settings**. Figure 15 shows an example.

Figure 15: Example document library settings



The following sections show configurations made to the sample template that you created in “Creating a New Fax Library from a Template” (page 22). You need not configure those settings on that particular Fax Library Template. You can use any Document Library to configure the settings.

Configuring Fax Import Settings

Use the **Fax Import Settings: Documents** page to specify whether faxes are imported from RightFax or another library, and to configure settings for either option. Only the document that has the *Paper* content type in the Publisher Document Library will be imported, not all documents.

- In the document library settings, in the **Communications** area, click **Fax Import Settings**.

The **Fax Import Settings: Documents** page opens (Figure 16).

Figure 16: Configure settings to import from RightFax or another library

Fax Import Settings: Documents

Use this page to change the settings of this document library to define how it integrates with RightFax to receive papers. You can set the RightFax user and password for this document library, choose how to classify documents, etc...

<p>Import</p> <p>Specify whether to allow items to be added to this document library through RightFax. Users can send e-mail messages directly to the document library by sending a fax to the user you specify</p>	<p>Allow this document library to import documents from RightFax?</p> <p><input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes</p>
<p>Filter</p> <p>Use these settings to import faxes that match only specific criteria.</p>	<p><input checked="" type="radio"/> Import all faxes</p> <p><input type="radio"/> Import only faxes that meet all the following criteria:</p>
<p>Store in Folders</p> <p>Specify whether to group documents in folders, and whether to overwrite existing files with the same name.</p> <p>Note: for performance reasons, choose an option in a way to keep the number of documents in the folder lower than one thousand documents.</p>	<p><input type="radio"/> Save all documents in root folder</p> <p><input checked="" type="radio"/> Save all documents in folders grouped by fax subject</p> <p><input type="radio"/> Save all documents in folders grouped by fax sender</p> <p><input type="radio"/> Save all documents in folders grouped by date</p> <p>Overwrite files with the same name?</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>
<p>Fax Deletion policy</p> <p>Specify whether to delete Fax from its source after it is successfully imported.</p>	<p><input type="checkbox"/> Delete fax from Source when successfully imported</p>

To import from RightFax

All steps in this procedure refer to Figure 17.

To establish a successful connection to the RightFax server, the combination of properties described in Step 3 must map to a valid RightFax Inbox in the selected server. The authentication mode depends on Identification of the User in the RightFax Enterprise Fax Manager, whether it uses Integrated Windows NT Security.

1. In **Allow this document library to import documents?**, select **Yes**.
2. Select **Connect to a RightFax Server**.
3. Select the desired **Server**; provide **User** and **Password** credentials; and select the appropriate **Authentication** type.

Note: If using a domain account, the username must be in the format *Domain\Username*.

Figure 17: Subscribing to a RightFax server

Allow this document library to import documents?

No

Yes

Connect to a RightFax Server

Server:

User:

Password:

Authentication:

Connect to a Document Library

To import from a SharePoint Document Library (not RightFax)

1. In **Allow this document library to import documents?**, select **Yes**.
2. Select **Connect to a Document Library**.
3. In **Specify the Library's URL**, enter the URL for the library you want to import from.

Storing documents in folders

This section describes the **Store in Folders** area on the **Fax Import Settings: Documents** screen (see Figure 16 on page 23).

You can save faxes in different ways: either saved directly to the root folder of the library, or grouped in subfolders per priority, sender, or date. You can also specify whether to overwrite files with the same name, which would be performed only when subscription is made to another Document Library. See the **Store in Folders** area on the **Fax Import Settings: Documents** screen (Figure 16 on page 23).

Note: When the grouping settings are changed, the previous grouping is preserved and the new grouping applied. Example: the initial settings were configured to group imported faxes based on priority. Thus, folders exist with the priority name (such as "High") that contain all the imported faxes with the corresponding priority. If these settings are changed to group the imported faxes by sender rather than priority, then another set of folders with the sender name is added.

Setting a policy for deleting faxes

This section describes the **Fax Deletion Policy** area on the **Fax Import Settings: Documents** screen (see Figure 16 on page 23).

The **Delete fax from Source when successfully imported** option is available only for libraries that import faxes from RightFax. It is disabled for library-to-library subscriptions. Selecting this option deletes faxes from the RightFax Inbox after they are successfully imported.

Configuring Fax Sending Settings

Use the **Fax Sending Settings: Documents** page to specify whether faxes are sent from a document library through a subscribed RightFax server.

1. In the document library settings, in the Communications area, click **Fax Sending Settings**.
The **Fax Sending Settings: Documents** page opens.
2. In **Allow this document library to send out faxes through RightFax?**, select **Yes**.
3. Select the desired **Server**; provide **User** and **Password** credentials; and select the appropriate **Authentication** type.

Note: If using a domain account, the username must be in the format *Domain\Username*.

4. To enable sending faxes via drag-and-drop in the document library, select **Enable DropBox**.

Sending Faxes

End-users can send faxes in three ways:

- **Send faxes manually** – From the document library: hover the mouse pointer over a document name; click the resulting down-arrow, and select **Send Fax**. Then, enter a recipient, fax number, and cover sheet notes.
- **Create a “new paper” fax** – From the document library: click **New > Paper**. Save the document, and then enter a recipient, fax number, and cover sheet notes.

Note: You must select the **Enable NewPaper** box on the **Fax Sending Settings** screen for end-users to have this option available to them.

- **Drag and Drop** – Drag a valid document to the document library in explorer view.

Note: You must select the **Enable DropBox** box on the **Fax Sending Settings** screen for end-users to have this option available to them.

Note: A “valid document” is of a file type supported by RightFax and with the naming convention *Recipient_Fax#* (Example: John_105.tif).

Fax Content Type: Paper

The *Paper* content type contains additional columns representing the fax's metadata. End-users can choose which metadata to display by changing the view of the Document Library.

Figure 18: Example metadata categories (circled) available with the *Paper* content type

Team Site > Paper Center > Fax Library > 4-6-2007

Fax Library

New | Upload | Actions | Settings | View: All Documents

Type	Name	Created	From	Total Pages	Priority
	33554541	6/4/2007 7:54 PM	Jack Connelly	12	1
	33554542	6/4/2007 7:55 PM	Richard Aniston	14	2
	33554545	6/4/2007 7:55 PM	Paul Meers	3	1
	33554550	6/4/2007 7:57 PM	Stephan Genz	5	3
	33554551	6/4/2007 7:57 PM	Jennifer Ford	4	1
	33554554	6/4/2007 8:03 PM	James Jackson	10	1

Available properties:

- Fax Record Date Time
- From Fax Number
- From Name
- From Voice Number
- Handle
- Is Received
- Priority
- To Company
- To Fax Number
- To Name
- To Voice Number
- Total Pages

Creating a Site with the 'Paper Center' Template

The Connector provides a site template named "Paper Center." You can use this template to create a customized site that shows a logo that merges the Captaris RightFax logo with the Microsoft Office SharePoint logo. Sites created using this template will also include a "Fax Library" type document library ready to be used for fax import and export. Also, the site has on its main page a Web part that shows the contents of the "Fax library" document library.

1. From the **Site Actions** menu, select **Create**.
2. In the **Web Pages** area, select **Sites and Workspaces**.
3. In the **New SharePoint Site** page, enter the site title, description and URL.
4. In the **Template Selection** area, on the **Custom** tab, select **Paper Center**.
5. Click **Create**.

The Connector produces a new site, similar to that shown in Figure 19.

Figure 19: The "Paper Center" site template

