



WHITE PAPER

What You Need to Know about Upgrading from Captaris® RightFax® 8.7 to RightFax 9.3

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INTRODUCTION

Captaris has created this white paper to provide information that will help you anticipate changes that are made to a RightFax system when it is upgraded to RightFax 9.3 from RightFax 8.7. It also provides general instructions for upgrading. Specific instructions are not provided here.

For more specific instructions for all of the RightFax 9.3 features, refer to the user documentation on the product CD and the Captaris product support Web site at <http://www.Captaris.com/support/index.html>. Documentation includes:

- Readme document.
- Online user guides in PDF file format.
- Captaris KnowledgeBase articles.
- Online help within the product applications.

The RightFax product suite includes features and modules that are not discussed in this white paper. For a complete list of the changes in RightFax 9.3, refer to **Technical Differences between RightFax 9.0 and RightFax 9.3**.

New Microsoft SQL Database

One of the most important and far-reaching improvements in RightFax 9.0 was the replacement of the proprietary database with one based on open standards, SQL.

The RightFax system uses the SQL database to manage:

- Users
- User groups
- Distribution lists
- Contacts
- Delegates
- Notifications
- History records
- Fax information such as receipt date and time
- Dialing rules

The RightFax Server uses the data in the database to organize, track and route faxes.

SUPPORTED VERSIONS OF SQL SERVER

- Microsoft SQL Server 2000, SQL Server 2005 and SQL Server 2005 Express Edition (32-bit and 64-bit) are supported in RightFax 9.3. Coexistence of RightFax and Microsoft SQL Server service packs and hot fixes will be supported by Captaris Technical Support services.
- Microsoft SQL Server 2005 Express Edition is provided on the product CD. This edition is provided free from Microsoft. To use it you must register with Microsoft after installation.
- Support for Microsoft SQL Server issues is outside the scope of Captaris Technical Support services. SQL Server problems or questions should be addressed to Microsoft.
- Microsoft SQL Server Database Engine (MSDE) is not supported in RightFax 9.3.

New RightFax DocTransport Module

In RightFax 9.0, the DocTransport module was added. The DocTransport module performs two roles:

- Manages transportation methods for documents
- Manages the conversion of received documents to fax images

Previously, the RightFax BoardServer module was responsible for sending and receiving faxes via hardware and Internet Protocol (IP). The DocTransport module now streamlines the BoardServer to only send faxes via hardware.

The DocTransport module now manages several document and message transport methods on the RightFax Server. The RightFax BoardServer module is considered a transport method in DocTransport. Additional transport methods are SMS, DOCplus, Fax over IP (FoIP) and Eicon Diva Server. Note: Eicon fax boards are only supported using RightFax International edition in this release. In the future, additional transport methods may be added.

In RightFax 9.3, the DocTransport module monitors the activity log in the SQL database for new documents. If new documents are found, the DocTransport module converts from IPK file format to Tagged Image File (TIF) G3 file format and copies the received documents to the RightFax\Image directory on the RightFax Server.

The DocTransport module inserts receipt information into a received document queue that is stored in the SQL database and the information is read by the RightFax Server module.

You Need to Know

During an upgrade from RightFax 8.7, the dialing rules and dialing prefix tables are moved to tables in the SQL database. Existing configurations are retained and no special configuration is required.

New Received Document Queue

To increase the speed of processing received documents, RightFax 9.3 stores a new received document queue in the SQL database. The queue stores receipt information about received documents and makes it available to the RightFax Server.

The DocTransport module monitors a RightFax activity log in the SQL database for new documents. If new documents are found, DocTransport module converts and copies the received documents to the RightFax/Images directory on the RightFax Server.

The DocTransport module inserts receipt information into the newly received document queue. The RightFax Server module queries the received document queue for received documents, reads and removes entries from the queue.

You Need to Know

After you upgrade, no configurations are needed to support the received document queue.

New RightFax Event Queue in the SQL Database

Prior to RightFax 9.3, the RightFax Server module stored fax events in memory. When the server module stopped, events were lost and the event queue was rebuilt when the server module was started again.

The RightFax event queue is now stored in the SQL database on the SQL Server. The queue is persistent; that is, it retains its objects and values if the RightFax Server module stops. It is not necessary to rebuild the queue.

You Need to Know

After you upgrade, no configurations are needed to support the RightFax event queue.

Dialing Rules have Moved to the SQL Database

Dialing rules are now stored in a table in the SQL database. They are no longer stored on the RightFax Server.

You Need to Know

After you upgrade, no configurations are needed to support dialing rules.

Dialing rules remain specific to a server. If you have more than one server, dialing rules must be administered from the server to which the rules apply. They are not centrally managed in RightFax 9.3.

Remote Services

The following RightFax services can be installed on remote computers to distribute workload:

- New in RightFax 9.0, the DocTransport module specifies the methods by which documents will be transmitted, via fax board, Fax over IP, DOCplus or SMS. It also converts and copies received documents to the RightFax\Image directory.
- In RightFax 9.3, the BoardServer module can be installed with the DocTransport module on remote servers to distribute the workload across several computers and to provide expanded channel capacity and system redundancy.
- As in RightFax 8.7, the WorkServer performs processor-intensive functions such as cover sheet generation, print-to-fax conversion and OCR.

You Need to Know

The DocTransport module must be configured on each RightFax Server, even if the server is not used to transmit documents or messages. To specify that a document be sent by a particular RightFax Server, you can use dialing rules to specify the server.

Support for ISA Fax Boards

Legacy ISA fax boards continue to be supported.

Support for Eicon Fax Boards

Eicon fax boards are supported using the RightFax International edition.

New Method for Server Side Application Conversion

For Server Side Application (SSA) conversion, a new conversion engine, Captaris Isolation Conversion Engine (ICE) converts documents to faxes on the RightFax Server from the applications Microsoft Word, Excel, PowerPoint and Internet Explorer. It also will convert Hypertext Markup Language (HTML).

The Microsoft applications must be installed on the RightFax Server. They should not be run on the server by end-users; they must be dedicated for use by the RightFax system.

The native application conversion process is now isolated from the WorkServer and is known as Captaris Isolation Conversion Engine (ICE). SSA is an optional conversion process and it is one of several document conversion processes that are used by RightFax to convert documents to TIF file format.

You Need to Know

After you upgrade, no configurations are needed to support the new conversion engine.

New Email Gateway Options

Separate Simple Mail Transfer Protocol (SMTP) and POP3 email gateways can be dedicated to sending and receiving faxes. Inbound faxes can be routed to specific SMTP servers, allowing greater flexibility and redundancy. Gateways can be configured to send, receive or both send and receive.

You Need to Know

After you upgrade, no configurations are needed to support the email gateways. You can create new gateways as you need them.

Integration with Xerox Devices via the WorkServer

Integrations with Xerox devices are no longer available via the WorkServer. When you upgrade the RightFax Server, these integrations will be inactivated.

You can install and configure the MFP Module to enable these integrations. MFP Module is available from http://www.Captaris.com/rightfax_products/integrations/mfp_module/MFPLegacyInfo.html.

Integration with HP Devices via the WorkServer

Integrations with HP devices are no longer available via the WorkServer. When you install the RightFax Server, these integrations will be inactivated.

You can install and configure the MFP Module to enable these integrations. MFP Module is available from http://www.Captaris.com/rightfax_products/integrations/mfp_module/MFPLegacyInfo.html.

New Prerequisites Installation Program

Prior to RightFax 9.3, the RightFax installation program performed three tasks:

- Evaluated and prepared the system to meet the RightFax requirements by installing third-party software
- Installed the RightFax software
- Configured the RightFax software

To simplify the installation program and distinguish step 1 from step 2, a new CD is provided to install prerequisites prior to installing the RightFax software.

The prerequisite installation program provides a wizard to guide you through the process of installing the required software.

The following table lists the RightFax components and requirements.

Microsoft SQL Server Express is included in the table because it has several of its own requirements.

RIGHTFAX COMPONENT	REQUIREMENTS						
	Windows	.NET	Microsoft Data Access Components (MDAC) 2.8	Microsoft Message Queue	IIS	Exchange 2000 or 2003	Windows Installer 3.0
RightFax Server	2000 Server* 2003 Server*	1.1	✓	✓			
RightFax Client Applications	2000 Workstation XP Professional						
Remote Services	2000 Server* 2003 Server*	1.1	✓	✓			
IIS Web Applications	2000 Server* 2003 Server*	1.1	✓		✓		
Exchange Connector	2000 Server* 2003 Server*					✓	
SQL Server Express	2000 SP4 2003 SP1 XP SP2	2.0					✓

* The requirement for a server edition of Windows (as compared to a workstation edition) is not fully enforced; the user can choose to proceed despite the warning that is displayed. This meets a long-standing request by Captaris sales and marketing to install demo versions on laptops or other computers.

New Directory Synchronization Service

A new service synchronizes RightFax data to Microsoft Active Directory and Lightweight Directory Access Protocol (LDAP) servers. The module does not require updates to existing schemas.

Captaris Sync is an XML/XSLT-based tool that lets RightFax administrators create and synchronize users from Active Directory domains, groups or organizational units. This service is installed and runs independently on the RightFax Server.

- Synchronization data is no longer stored in Active Directory, and, therefore, schema changes are not required.
- XML-based transform files replace the previous "profile" architecture and are stored locally.
- Multiple domains are supported.
- Robust and convenient real-time logging and diagnostics are available.
- Nested groups are not automatically included when synchronizing from parent groups.
- Visual Basic (VB) script is no longer used for custom synchronization profiles.
- Security has been improved.
- Synchronization is managed as a stand-alone service.

The Active Directory synchronization service in RightFax 9.0 and earlier is not supported in RightFax 9.3. It has been replaced with Captaris Sync. Captaris Sync is an independent service not tied to the WorkServer, as was the case with RightFax Active Directory Sync

CAUTION: SETTINGS WILL BE UNAVAILABLE UPON UPGRADE

After you upgrade, the settings for domains, organizational units, groups and profiles in the RightFax 8.7 Active Directory Sync are not imported, and they *cannot be viewed* in RightFax. They can be viewed using a utility, the Active Directory Sync Settings Viewer.

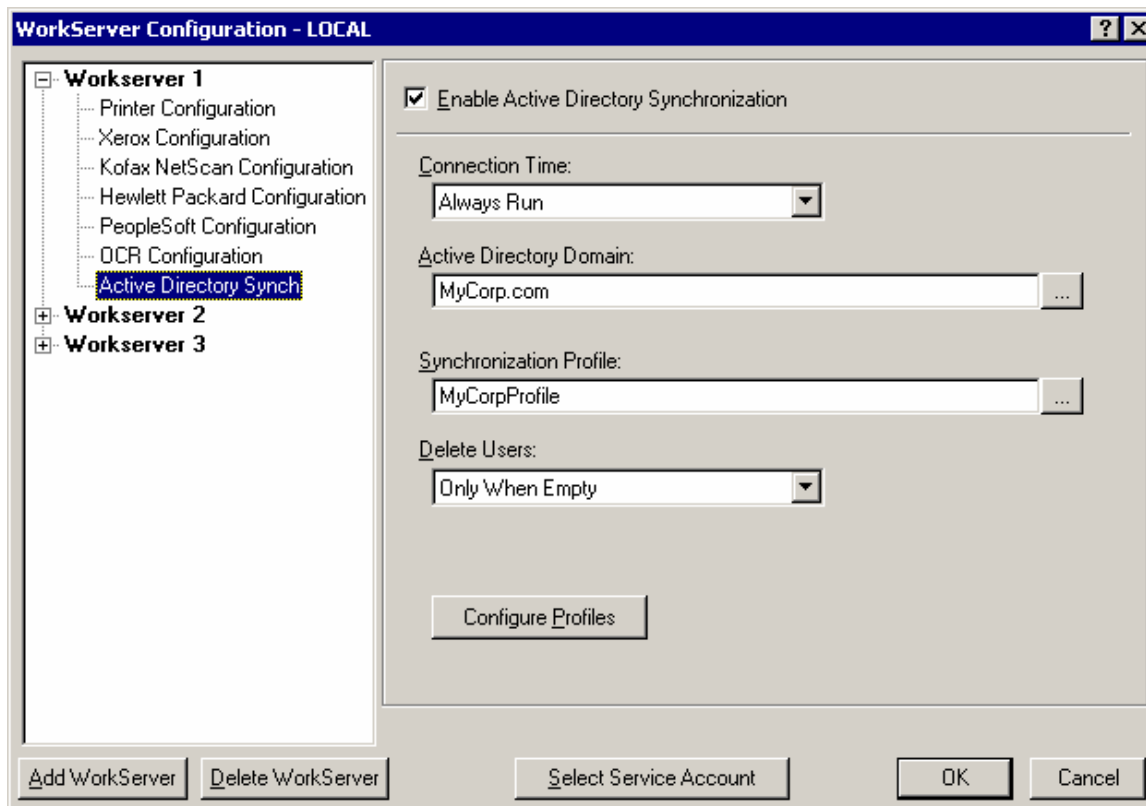
You have the following options for viewing the settings:

- Before you upgrade, view and record the settings in the WorkServer.
- Before you upgrade, view and print the settings with the Active Directory Sync Settings Helper utility.
- After you upgrade, view and print the settings with the Active Directory Sync Settings Helper utility.

VIEWING AND RECORDING THE SETTINGS IN THE WORKSERVER

Before you upgrade from RightFax 8.7, open each WorkServer that was configured for Active Directory Sync and write down the domains, organizational units, groups and profile for each WorkServer. You also can print the screen images.

Figure 1. Before you upgrade from RightFax 8.7, you can open each WorkServer and copy the configuration settings for Active Directory Sync.

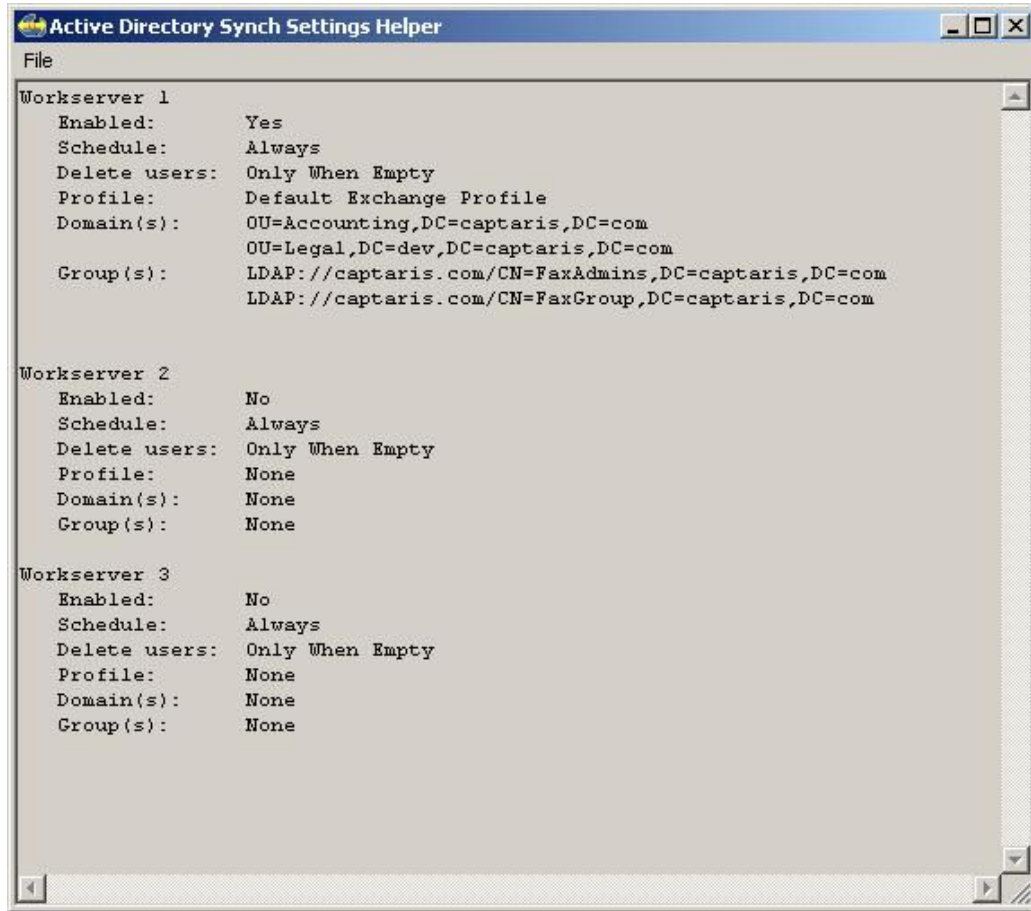


VIEWING AND PRINTING THE SETTINGS WITH ACTIVE DIRECTORY SYNC SETTINGS HELPER UTILITY

Run the Active Directory Sync Settings Helper utility on each RightFax Server that is configured with one or more WorkServer modules that perform Active Directory synchronization.

- Insert the RightFax Product Suite CD.
- Navigate to the folder \RightFax\Support and run AdSyncSettingsViewer.exe.
- The settings appear in a viewer.
- Save and print the file.

Figure 2. The Active Directory Sync Settings Helper shows the synchronization settings for the WorkServers.



UPGRADING FROM RIGHTFAX 8.7 WITH DEFAULT PROFILES

The RightFax 9.3 Captaris Sync service includes "Transform Files" and "Property Collections" that are equivalent to the RightFax 8.7 default profiles, "Default Windows Profile" and "Default Exchange Profile." After the upgrade, you must specify the transform file and property collection that corresponds to your RightFax 8.7 default profile.

The following table shows the new settings that correspond to the old profiles.

RIGHTFAX 8.7 ACTIVE DIRECTORY SYNC PROFILE	RIGHTFAX 9.3 CAPTARIS SYNC TRANSFORM FILE	RIGHTFAX 9.3 CAPTARIS SYNC PROPERTY COLLECTION
Default Windows Profile	Default Active Directory to RightFax.xml	Default Windows Properties
Default Exchange Profile	Default Active Directory-Exchange to RightFax.xml	Default Exchange Properties

UPGRADING FROM RIGHTFAX 8.7 WITH CUSTOM SYNCHRONIZATION PROFILES

If you used custom synchronization profiles with RightFax 8.7 Active Directory Sync, then you can import your custom profiles into the new Captaris Sync service. The import process will generate a new transform file and a new property collection.

If the old profile did not use custom VB Script, then you can configure Captaris Sync to use the generated transform file and property collection.

However, if your custom profile made use of custom VB Script, then you may need to perform additional work, depending on the actions of the script.

In many cases, the increased flexibility and capabilities of the new Captaris Sync service will obviate the need for custom coding. For example, custom VB Script may have been used to set default values for users. This can now be accomplished by setting the "RightFax User Template" in the Captaris Sync Module Configuration dialog box to specify a RightFax user that can be used as a model for creating new users.

You can create multiple RightFax configurations, for example, one for synchronizing administrators and another for synchronizing typical users, and each can be configured differently.

So, it's possible that if you used custom code in RightFax 8.7 Active Directory Sync, you may no longer need it.

If you find that you need to perform special actions, then you must manually modify the generated transform file to perform actions equivalent to the custom VB Script. To make this process easier, the generated transform file contains comment blocks showing the original VB Script for each synchronized property. For each comment block, you must implement XSLT code similar in effect to the VB Script.

Note: This process requires experience with XSLT and VB Script.

For a list of the RightFax properties for Active Directory synchronization, refer to the Appendix.

CREATING A CUSTOM XSL MAPPING

Custom XSL mapping will *read* Active Directory attributes and *write* RightFax properties. It does not read (or evaluate) RightFax properties. The following XSL sample can be used within the context of a complete XSL file, such as the default file that is included with Captaris Sync module. This example checks a fictional attribute named "SomeAttribute." If its value is "Sales," then the RightFax attribute "AllowChangeCover" will be set to **true**; otherwise, it will be set to **false**.

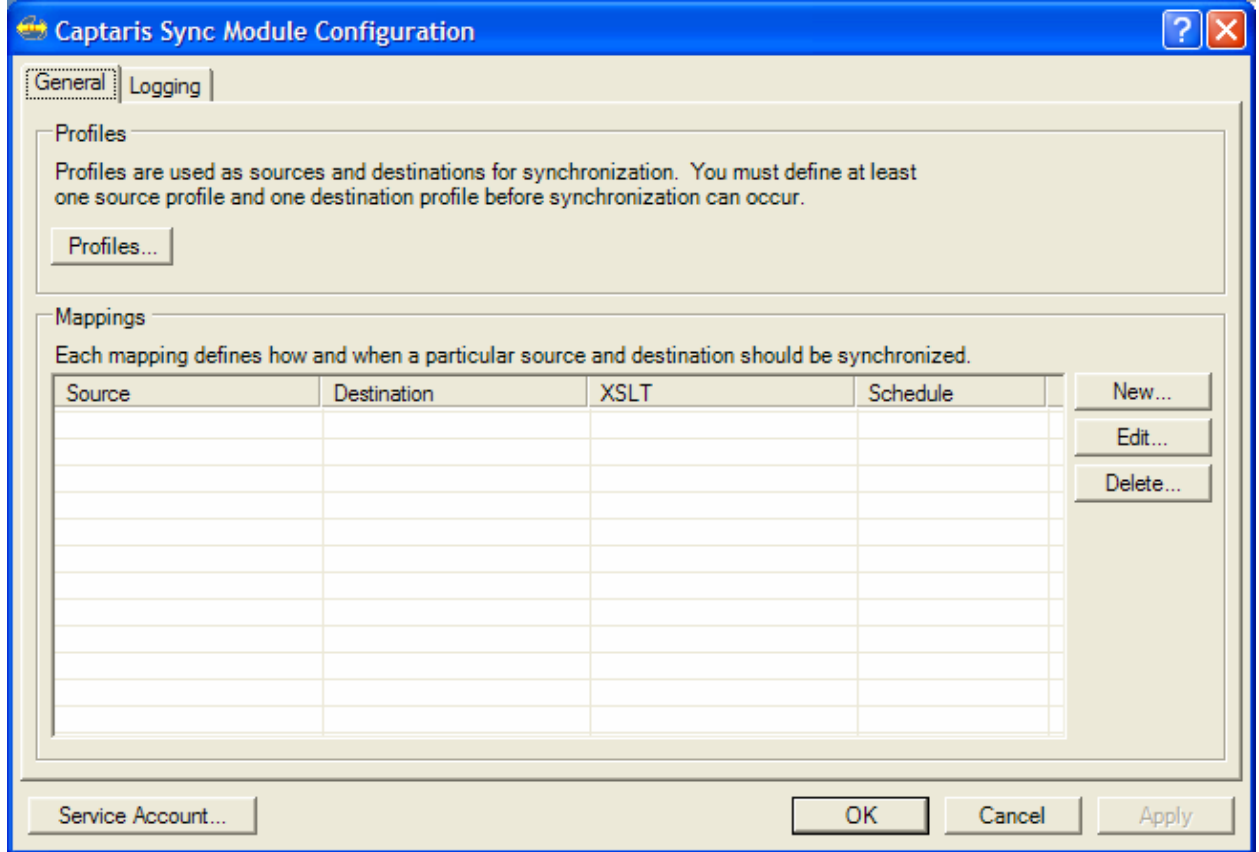
```
<xsl:template match="rf:attr[@name='SomeAttribute']">
  <attr name="AllowChangeCover">
    <value>
      <xsl:choose>
        <xsl:when test="node()='Sales'">true</xsl:when>
        <xsl:otherwise>false</xsl:otherwise>
      </xsl:choose>
    </value>
  </attr>
</xsl:template>
```

CONFIGURING CAPTARIS SYNC MODULE

To configure and create the new Captaris Sync service use the Captaris Sync Module Configuration dialog box.

Online help for the Captaris Sync Module is not available in this release.

Figure 3. The Captaris Sync Module Configuration dialog box is used to configure and create the new Captaris Sync service.



Upgrading the RightFax Client Applications for Windows from Previous Releases

In RightFax 9.3, the client applications for Windows can be installed and deployed separately from the server installation using a stand-alone client installation program. The client applications are:

- FaxUtil
- RightFax Print Driver
- MAPI Print Driver
- VIM Print Driver
- Outlook Advanced Fax Extension
- AutoReply Client
- Enterprise Fax Manager

This design supports large enterprises with many end-users. It is a smaller installation program that can be more easily "pushed" to end-user computers in a network.

You Need to Know

You have the following options for installing the RightFax 9.3 client applications for Windows.

OPTION	DESCRIPTION
Install separately from the server installation using a stand-alone client installation program.	The stand-alone client installation program cannot upgrade RightFax 8.7 client applications. To deploy the client RightFax applications using the new stand-alone client installation, you should uninstall the old client application.
Install as components of the product suite installation program.	To upgrade client applications that were installed from the product suite installation program you can use the RightFax 9.3 product suite installation program.

WHAT VERSIONS OF THE CLIENT APPLICATIONS CAN BE UPGRADED?

The following table provides a summary of possible upgrade scenarios.

	UPGRADES RIGHTFAX 9.0 SP2?	UPGRADES RIGHTFAX 8.7 SP3?	UPGRADES RIGHTFAX 8.5 AND OLDER?
RightFax client applications for Windows, from product suite install	Yes	Yes	No
RightFax client applications for Windows, new independent install	No	No	No

Upgrading the RightFax Server from Previous Releases

WHAT VERSIONS CAN BE UPGRADED?

The RightFax 9.3 Server installation program can upgrade a RightFax 9.0 Service Pack 2 or RightFax 8.7 Service Pack3 Server.

Upgrading from earlier versions is not supported by the RightFax 9.3 installation program. Contact Captaris Technical Support for help with manually upgrading from earlier versions.

	UPGRADES RIGHTFAX 9.0 SP2?	UPGRADES RIGHTFAX 8.7 SP3?	UPGRADES RIGHTFAX 8.5 AND OLDER?
RightFax 9.3 Server install	Yes	Yes	No
RightFax client applications for Windows, from product suite install	Yes	Yes	No
RightFax client applications for Windows, new independent install	No	No	No

HOW LONG WILL THE DATA MIGRATION TAKE?

To ensure data integrity the migration of data from a RightFax database to a Microsoft SQL database is performed record by record. The migration will upgrade about 20,000 documents per hour or 500,000 documents per day.

UPGRADE SCENARIOS

Several upgrade scenarios are possible, such as:

- Install RightFax 9.3 on a RightFax 8.7 Server, an "in-place" upgrade. See *In-place Upgrade* on page 14.
- Install RightFax 9.3 on a new server computer and migrate the data from a RightFax 8.7 Server. See *Install on a New Server and Migrate Data* on page 14.
- Upgrade multiple RightFax 8.7 Servers to RightFax 9.3 and share a SQL database. See *Upgrade to a Shared SQL Database* on page 16.

IN-PLACE UPGRADE

Follow the instructions for upgrading in the *RightFax 9.3 Installation Guide*, Chapter 3, "Installing the RightFax Server Software."

The user guide includes instruction for converting the RightFax 8.7 database to SQL.

Synchronize the date and time on the RightFax Server and the SQL Server. Faxes may delay in processing if they are not synchronized.

After the upgrade, apply the latest RightFax 9.3 service pack or hot fix. Updates are available at <http://www.Captaris.com/support/downloads/rightfax/index.html>.

INSTALL ON A NEW SERVER AND MIGRATE DATA

To migrate data from a RightFax 8.7 system to a new RightFax 9.3 system complete the following general steps:

- Back up all RightFax 8.7 data (optional).
- Back up the RightFax 8.7 settings in the Windows registry.
- Install RightFax 9.3 on a new server.
- Prepare the RightFax 8.7 Server for data migration.
- Migrate the RightFax data from the old server to the new server by copying the RightFax data folders.
- On the new server, upgrade the RightFax 8.7 database to a RightFax 9.3 database using the DBUpgrader utility. The utility will create tables in SQL and import all RightFax data into the new tables.
- Use Enterprise Fax Manager to migrate dialing rules and dialing prefix tables.

Synchronize the date and time on the RightFax Server and the SQL Server. Faxes may delay in processing if they are not synchronized.

After the upgrade, apply the latest RightFax 9.3 service pack or hot fix. Updates are available at <http://www.Captaris.com/support/downloads/rightfax/index.html>.

If you are running the RightFax Integration Module or a SAP Gateway for RightFax on the RightFax Server, contact Captaris Technical Support before moving the RightFax Server.

In the following instructions, "OLDFAX" is the RightFax 8.7 Server. "NEWFAX" is the new server where RightFax 9.3 will be installed.

Step 1: Backing Up all RightFax Data

During the migration process, the data on the RightFax Server will not be removed, so it is not necessary to back up the database. However, you can back up the data to ensure that you have a copy in the event of problems.

Step 2: Backing Up the Windows Registry

On OLDFAX, print or make a copy of the Windows registry key HKEY_LOCAL_MACHINE\Software\RightFax so that you have a copy of any changes that have been made to customize the system.

If you have the Docs-on-Demand Module, go to HKEY_LOCAL_MACHINE\Software\RightFax\Boardserver\FOD. Save the FOD key in a safe location.

Step 3: Installing RightFax 9.3 on NEWFAX

- On NEWFAX, install RightFax 9.3 and reboot if prompted. Follow the instructions for a new installation in the *RightFax Installation Guide*.
- Ensure that all RightFax services start and run.
- Configure NEWFAX (DocTransport, Server, WorkServer and optional modules).
- Stop all RightFax services on NEWFAX.

Step 4: Preparing OLDFAX for Migration

- On OLDFAX, stop all RightFax services.
- On OLDFAX, open a DOS command prompt and navigate to RightFax\Database.
- Run Rescue.exe.

Step 5: Migrating data

Copy the following files from OLDFAX to their respective locations on NEWFAX.

FOLDER AND FILES	NOTES
\RightFax\Database\Faxdata.*	--
\RightFax\Image*.*	--
\RightFax\Fcs*.*	If you have created custom cover sheets
\RightFax\Papers*.*	If you have created overlay forms
\RightFax\CMDData*.*	--
\RightFax\Production\Bin*.bat	If the batch file has been customized
\RightFax\Production\Covers*.*	--
\RightFax\Production\Forms*.*	--
\RightFax\Production\Images*.*	--
\RightFax\Production\Include*.*	--
\RightFax\Production\xml\xsl*.*	If the XSL files have been customized
\RightFax\Production\xml\schemas*.*	If the XML schemas have been customized
\RightFax\RFBoard\ACTLOG.DAT	Copy to \RFBoard only.
\RightFax\RFBoard\digital.cfg	--
\RightFax\RFBoard\Boston\callctrl.cfg	If present
\RightFax\RFBoard\Voices*.*	If you use the Docs-on-Demand, Human-answered Fax or Teleconnect module and have created custom voice files
\RightFax\Sig*.*	If users have created graphic images of user signatures for placement on faxes
\RightFax\Bft*.*	If you have OCR documents or sent or received binary file transfers
\RightFax\Worksrv	Caution: Do not copy any files from the WorkServer directory except OCR routing files (such as Route.txt).

Step 6: Upgrading the RightFax 8.7 Database to a RightFax 9.3 Database

- On NEWFAX, open a DOS command prompt.
- Navigate to the directory where you installed RightFax, such as C:\Program Files\RightFax\Database.
- Run the command dbupgrader.
- When prompted, choose **Yes**, and all data will be imported into the new RightFax 9.3 database.

Step 7: Copy Prefix Tables and Dialing Rules

- On **OLDFAX**, open both the OLDFAX server and the NEWFAX server in Enterprise Fax Manager.
- Drag-and-drop the dialing rules from the OLDFAX server to the NEWFAX server

Note: You will see the following error, which can be ignored. Click **OK**.

“The servers (servername) and (servername) are running with different code pages. Copying data between the servers may result in a loss of data where an object uses characters only available in the source code page”

- Highlight **Dialing Rules** under NEWFAX. Under the File menu, select **Save Dialing** plan.
- The Prefix Tables cannot be drag-and-dropped like the dialing rules.

Prefix Tables must be re-created on the NEWFAX server. To ease the re-creation the table entries can be copy-pasted from the OLDFAX server to the NEWFAX server.

- Stop and start the DocTransport module.
- Apply the most current RightFax hot fix or service pack and reboot if prompted.

UPGRADE TO A SHARED SQL DATABASE

In RightFax 9.3, two or more servers can share a common SQL database. This is known as the RightFax Shared Services Module and it must be purchased separately for RightFax 9.3 Enterprise Servers.

In the shared database configuration, multiple RightFax Servers share all of the data in the SQL database—users, delegates, phonebook entries, distribution lists and document data such as fax status. The data is available to all the administrators and clients in the network. All received faxes are stored on the SQL Server and are available to all clients in the network.

Upgrade scenario: Migration of multiple RightFax 8.7 Servers to multiple new RightFax 9.3 Servers that share a SQL database.

In this scenario, RightFax 9.3 must be installed as a new installation, not as an upgrade.

Complete the following general steps. For detailed instructions for installing RightFax Servers to share a SQL database, refer to the *RightFax 9.3 Installation Guide*.

- Install RightFax 9.3 on the new servers and follow the instructions for creating a Shared Services configuration in the *RightFax 9.3 Installation Guide*.
- On one of the RightFax 9.3 Servers, open Enterprise Fax Manager and connect to one or more RightFax 8.7 Servers.
- Click-and-drag to copy each data object from the RightFax 8.7 Servers to the RightFax 9.3 Server. As it is copied, the data will be migrated to the SQL database schema and will be available to all of the servers in the new shared database.

After the upgrade, apply the latest RightFax 9.3 service pack or hot fix. Updates are available at <http://www.Captaris.com/support/downloads/rightfax/index.html>.

Synchronize the date and time on the RightFax Server and the SQL Server. Faxes may delay in processing if they are not synchronized.

Simulating the Sending and Receiving of Faxes

To test the system, you can send and receive faxes in simulation mode.

TESTING FAX SENDING

A new transport type in the DocTransport module allows you to send faxes on simulated fax channels. To set this up in the DocTransport module add a new transport and select the "Simulation" transport. You can configure fax channels and global settings for the simulation.

TESTING FAX RECEIVING

To receive faxes create a dialing rule with the destination set to receive into the local server. The dialing rule will intercept the fax before entering the simulation transport. Therefore, sending will not be simulated.

RIGHTFAX DATABASE SCHEMA

The RightFax SQL database schema is provided with the user guides in PDF on the product CD.

ABOUT CAPTARIS, INC.

Captaris, Inc. is a leading provider of software products that automate business processes, manage documents electronically and provide efficient information delivery. Our product suite of Captaris RightFax, Captaris Workflow and Captaris Alchemy Document Management is distributed through a global network of leading technology partners. We have customers in financial services, healthcare, government and many other industries, and our products are installed in all of the Fortune 100 and many Global 2000 companies. Headquartered in Bellevue, Washington, Captaris was founded in 1982 and is publicly traded on the Nasdaq National Market under the symbol CAPA. For more information, please visit www.Captaris.com.

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Appendix

RightFax Properties for Active Directory Synchronization

RIGHTFAX USER PROPERTIES

The following table lists the RightFax user properties that are available to the Captaris Sync Module, listed in alphabetical order.

The range of acceptable values for each property is determined primarily by its data type. Data types are detailed further on in this document.

PROPERTY NAME	DATA TYPE	COMMENT
AllowAnnotation	bool	—
AllowBillingCodeEdit	bool	—
AllowBillingCodeLookup	bool	—
AllowChangeCover	bool	—
AllowDelete	bool	—
AllowHighPriority	bool	—
AllowModifyForm	bool	—
AllowModifyLibrary	bool	—
AllowOCR	bool	—
AllowRunReports	bool	—
AllowSMS	bool	—
AllowViewAllPages	bool	—
AltUser	string	—
ArchiveSent	bool	—
AssociatedNTAccountSID	string	—
AutoDelete	AUTODELETE	—
AutoForward	bool	—
AutoForwardInfo	string	—
AutoForwardType	AutoForwardType	Changing this causes AutoForwardInfo to be cleared to an empty string.
AutoOCR	bool	—
AutoOCRExt	string	—
AutoOCRFlags	OCRFLAGS	—
AutoOCRFormat	OCRFORMAT	—
AutoOCRLayout	OCRLAYOUT	—
AutoPrint	bool	—
AutoPrintReceivedBody	bool	—
AutoPrintReceivedCover	bool	—
AutoPrintReceivedHistory	bool	—
AutoPrintReceivePrinter	string	—

PROPERTY NAME	DATA TYPE	COMMENT
AutoPrintSent	bool	—
AutoPrintSentBody	bool	—
AutoPrintSentCover	bool	—
AutoPrintSentFailed	bool	—
AutoPrintSentHistory	bool	—
AutoPrintSentPrinter	string	—
AutoPrintSentSuccess	bool	—
AutoUpdate	bool	—
BillingCodeVerified	bool	—
CallbackRequested	bool	—
Cover	bool	—
CoverModelName	string	—
CreatedViaSynchronization	bool	—
DefaultBillingInfo1	string	—
DefaultBillingInfo2	string	—
DefaultPrintAutoScale	bool	—
DefaultPrintCollate	bool	—
DefaultPrintCopies	int	—
DefaultPrintDuplex	PRINTDUPLEX	—
DefaultPrinter	string	—
DefaultPrintOutputBin	PRINTOUTPUT	—
DefaultPrintPriority	PRIORITY	—
DefaultPrintQuality	PRINTRES	—
DefaultPrintSecurityCode	int	—
DefaultPrintSize	PRINTSIZE	—
DefaultPrintSource	PRINTSOURCE	—
DefaultPrintStaple	bool	—
DefaultPriority	PRIORITY	—
DeleteAfterSuccessfulRoute	bool	—
DistinguishedName	string	—
EDCReceives	bool	—
EDCSends	bool	—
EmailAddress	string	—
EmailRouteForm	EmailRouteFormType	—
EmptyTrashOnExit	bool	—
ExcludeDocsFromAging	bool	—
FineBody	bool	—
FineCover	bool	—
FromName	string	—

PROPERTY NAME	DATA TYPE	COMMENT
GeneralFaxNum	string	—
GeneralVoiceNum	string	—
GroupID	int	—
HighestPriority	PRIORITY	—
IsAdministrator	bool	—
MailBoxProtected	bool	—
Marked	bool	—
MobileAddress	string	—
NeedsSendApproval	bool	—
NotifyInfo	string	—
NotifyReceived	NotifyMode	—
NotifyReceivedAltUser	bool	—
NotifySendErrorAbandoned	bool	—
NotifySendErrorRetry	bool	—
NotifySendFlags	NOTIFY_SND	—
NotifySendHeldForPreview	bool	—
NotifySending	NotifyMode	—
NotifySendNeedsApproval	bool	—
NotifySendNeedsInfo	NotifyMode	—
NotifySentOk	bool	—
NotifyType	NOTIFYTYPE	—
OtherPhonebookPassword1	string	—
OtherPhonebookPassword2	string	—
OtherPhonebookPassword3	string	—
OtherPhonebookPassword4	string	—
OtherPhonebookUserID1	string	—
OtherPhonebookUserID2	string	—
OtherPhonebookUserID3	string	—
OtherPhonebookUserID4	string	—
Password	string	—
PersonalFaxNum	string	—
PersonalVoiceNum	string	—
PreferredImageViewingFormat	ROUTEFMT	—
RequiresNTAuth	bool	—
RequiresPassword	bool	—
RouteCode	string	—
RouteFormat	ROUTEFMT	—
RouteInfo	string	—
RouteType	ROUTETYPE	—

PROPERTY NAME	DATA TYPE	COMMENT
SmartFaxDistribution	bool	—
SmartResume	bool	—
StampReceivedPages	bool	—
SyncGuid	string	—
SyncSource	string	—
SyncUSN	string	—
ToCityState	string	—
ToCompany	string	—
UpdateInterval	int	—
UseDefaultBillingInfo	bool	—
UserID	string	—
UserName	string	—
UseTrash	bool	—
VoiceMailSubscriberID	ulong	—
WebSendRFX	bool	—
WebSendTIFF	bool	—

RIGHTFAX DATA TYPES

The property data type indicates the range of values that can be assigned to it. Standard and custom data types are available.

Standard Data Types

WebSendRFX	"true" or "false"
int	32-bit integer
long	64-bit integer
ulong	64-bit unsigned integer

Custom RightFax Data Types

When using a custom data type in an XSL file, you must specify the numeric value, not the description. For example, to use Exchange, set the RouteType property to 11.

```
AUTODELETE
  NONE           0
  SUCCESS        1
  ALL            2
```

```
AutoForwardTypes
  Phone          0
  User           1
```

```
EmailRouteFormType
  Default        0
  None           1
  Standard       2
  Advanced       3
```

```
NotifyMode
  Never          0
  Once           1
  Periodically   2
```

NOTIFY_SND (combine values by OR'ing them together)

NEEDS_FCS1	0x0001
NEEDS_FCS2	0x0002
SENDING1	0x0004
SENDING2	0x0008
SENDRETRY	0x0010
SENDOK	0x0020
SENDERR	0x0040
NOPREVIEW	0x0080
APPROVAL	0x0100

NOTIFYTYPE

NETBROADCAST	0
CUSTOM1	1
CUSTOM2	2
CUSTOM3	3
CUSTOM4	4
CUSTOM5	5
CUSTOM6	6
CUSTOM7	7
CUSTOM8	8
CUSTOM9	9
CCMAIL	10
MSMAIL	11
GROUPWISE	12
TRS	13
CX3	14
PAGER	15
NOTES	16
EXCHANGE	17
SMTP	18
SMS	19
ANY	0xFFFF

OCRFLAGS (combine values by OR'ing them together)

ROUTEMSMAIL	0x0001 (route to msmtp after OCR)
ROUTECCMAIL	0x0002 (route to ccmml after OCR)
CLEANUP	0x0004
MESSAGEUSER	0x0008
ROUTEWPOMAIL	0x0010 (route to GroupWise after OCR)
PRINTFAX	0x0020 (print fax after OCR)
ROUTEGENMAIL	0x0040 (route to generic email after OCR)

OCRFORMAT

SMARTASCII	0
ASCII	1
RTF	2

OCRLAYOUT

WYSIWYG	0
LEFTJUSTIFIED	1

PRINTDUPLEX

DEFAULT	0
SINGLE	1
LONGEDGE	2
SHORTEDGE	3

PRINTOUTPUT

DEFAULT	0
UPPER	1
LOWER	2
FINISHER	3
MAILBOXFIRST	4
MAILBOXLAST	27

PRINTRES

HIGH	0
MEDIUM	1
LOW	2

PRINTSIZE		
DEFAULT		0
LETTER		1
LEGAL		2
A4		3
LETTERLEGAL		4
A4LEGAL		5
PRINTSOURCE		
DEFAULT		0
UPPER		1
LOWER		2
MANUAL		3
TRAY3		4
MPTRAY		5
HIGHCAPACITY		6
PRIORITY		
NORMAL		0
LOW		1
HIGH		2
ROUTEFMT		
DCX		0
PCX		1
TIFFG3		2
TIFFG4		3
GIF		4
PDF		5
PDFWITHTHUMBNAI		6
CPC		7
RFX		8
PNG		9
TXT		10
ROUTETYPE		
RF		0
CCMAIL		1
MSMAIL		2
//MHS		3 (NO LONGER USED)
FILE		4
OCR		5
WPOFF		6
WPOMAIL		6
NOTES		7
XROUTE		8
TRS		9
CX3		10
EXCHANGE		11
SMTP		12
ANI		13
SAP1		14
SAP2		15
SAP3		16
SAP4		17
SAP5		18
SAP6		19
SAP7		20
SAP8		21
SAP9		22
SAP10		23
SAP11		24
SAP12		25
SAP13		26
SAP14		27
SAP15		28
SAP16		29
CXINTF		200