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About the Captaris RightFAX Plugin

The Captaris RightFAX plugin will allow Reform 12 Enterprise to interact with a RightFAX server in order to automatically distribute documents to your fax system.

System Requirements

- Reform 12 Enterprise
- Windows 2003 Server, Windows 2000, or Windows XP (64-bit editions of Windows are NOT supported)
- RightFAX FaxUtil application installed (for client)

Installation

To install the Captaris RightFAX plugin to your existing Reform 12 Enterprise installation, download and run the Captaris RightFAX installation executable.



Step through the prompts, and the installation will begin. Allow the installation to complete and then read on to the next section to learn how to implement Captaris RightFAX to your forms.

Setting up your First RightFAX-Enabled Form

In this tutorial, we are going to create a new form from an existing template, and then configure it to send a document to a RightFAX server to be sent out. The RightFAX Plugin uses data located in Special Fields on your form to push your fax job up to the RightFAX server. These Special Fields can be automatically added and configured by using the included setup wizard.

First, the Reform Designer must be started. To open it, go to Start>Programs>Reform Enterprise V12>Designer.

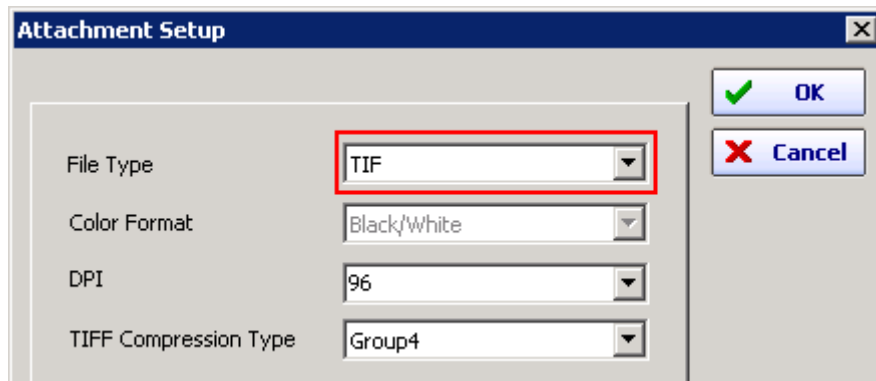
1. For the example, we will be creating a new form with an existing template. Go to **File>New>New**. Select the **Fax** template and click **OK**.



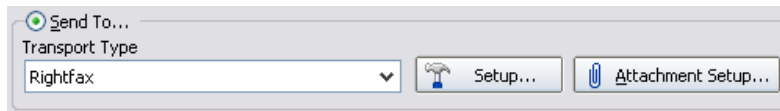
Fax.FTM
Quote

2. When it asks if you would like to open a text file for designing, select **Yes** and open **\Backups\Fax.out**.

3. Next, go to **File>Save** to save your form. Name it **Fax.fom**.
4. Next, you need to run the setup wizard to add all of the fields that the RightFAX plugin uses, so go to **File>Page Setup**. Near the bottom, change the Send-To device to **RightFAX**.
5. Click the **Attachment Setup** button. Change the File Type to **TIF**. Press **OK** to save your changes.



6. Next, click the **Setup** button to launch the setup wizard.

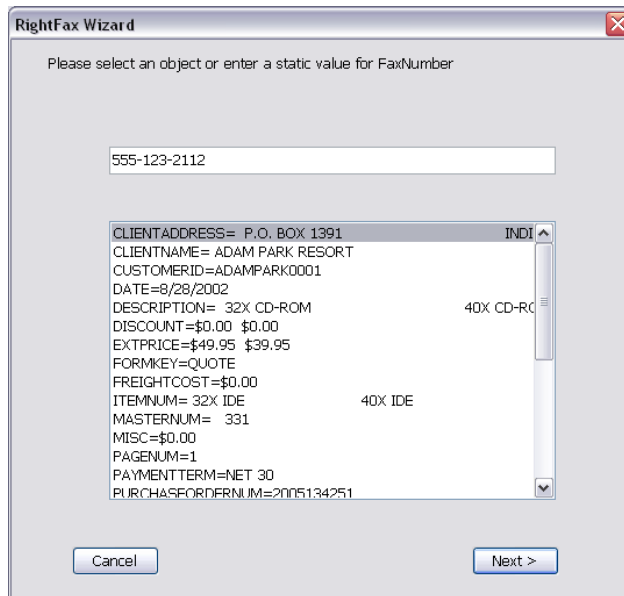


The setup wizard will walk you through a series of prompts that will gather information to be used in sending the email.

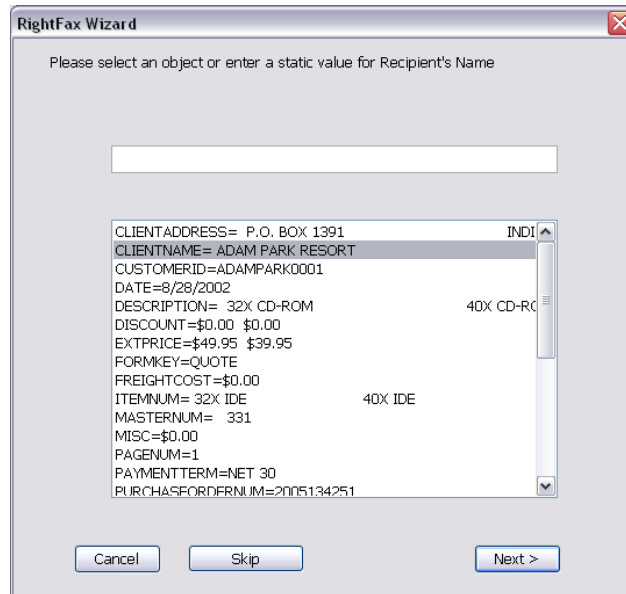
- The first page will ask for the server name and the user name that will be used to connect to the RightFax server. Fill in both boxes, and then click the **Start Wizard** button.



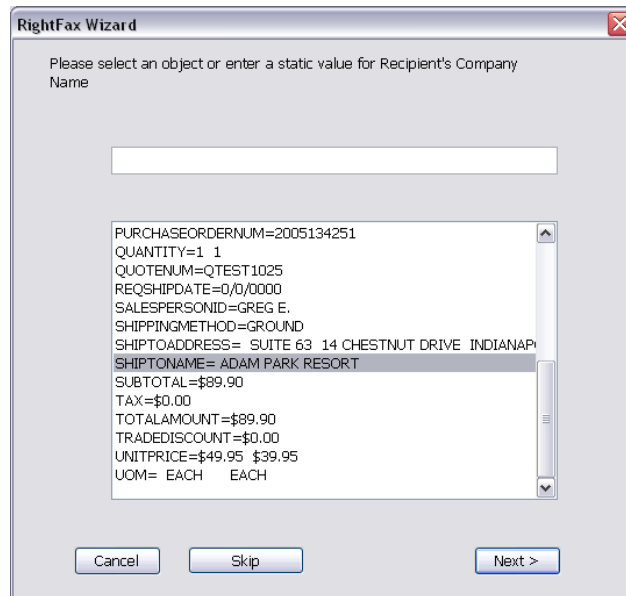
- This page lets you manually enter or choose a dynamic value for the destination fax number. Enter a value, then click **Next**.



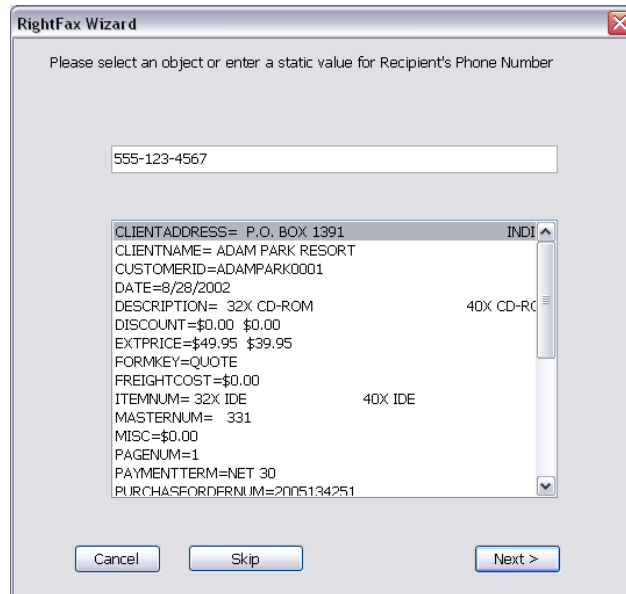
9. Select the **CLIENTNAME** object, then click **Next**.



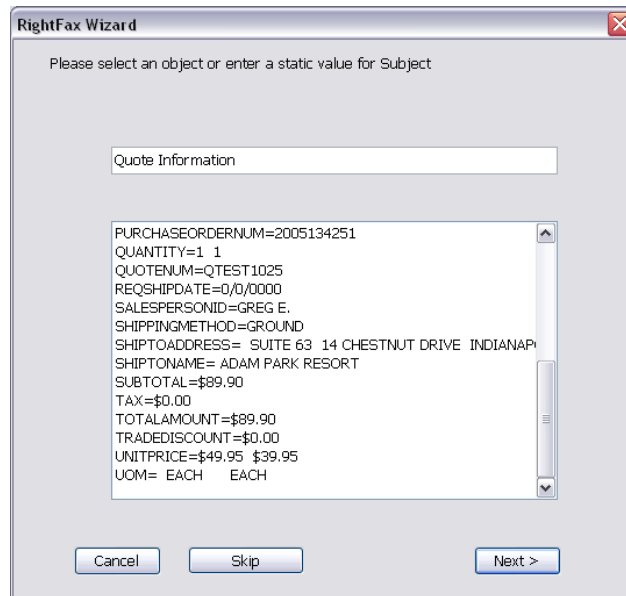
10. Select the **SHIPTONAME** object, then click **Next**.



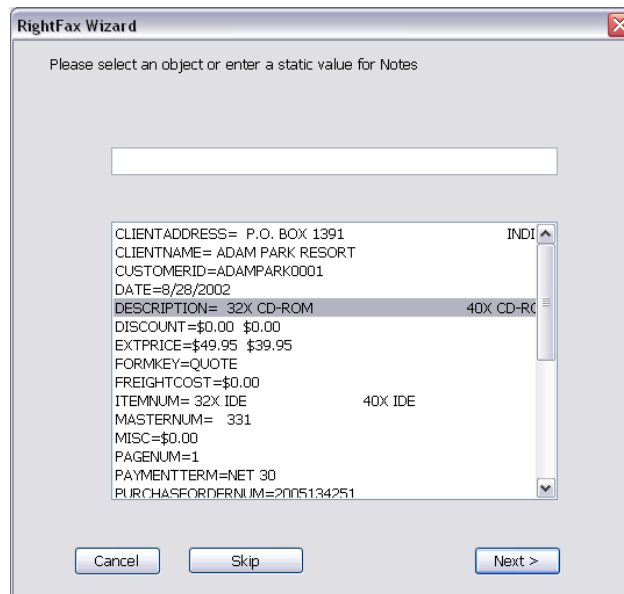
11. Enter a value for the recipient's phone number, and click **Next**.



12. Enter the value **Quote Information**, then click **Next**.



13. Select the **DESCRIPTION** object, then click **Next**.



RightFax Wizard

Please select an object or enter a static value for Notes

CLIENTADDRESS= P.O. BOX 1391 INDI
CLIENTNAME= ADAM PARK RESORT
CUSTOMERID=ADAMPARK0001
DATE=8/28/2002
DESCRIPTION= 32X CD-ROM 40X CD-R
DISCOUNT=\$0.00 \$0.00
EXTPRICE=\$49.95 \$39.95
FORMKEY=QUOTE
FREIGHTCOST=\$0.00
ITEMNUM= 32X IDE 40X IDE
MASTERNUM= 331
MISC=\$0.00
PAGENUM=1
PAYMENTTERM=NET 30
PURCHASEORDERNUM=2005134251

Cancel Skip Next >

All of the objects will be created and added to your form. Their values will also be set correctly.

The wizard has now finished. Click **OK** in the Page Setup window to save your changes.

14. In the Reform Designer, we can go to **File>Print**. Make sure that the Reform Spooler is running (Start>Programs>Reform Enterprise V12>Spooler) before you try this test.

Check your RightFAX server to make sure the fax was successfully sent.

Attachment Setup

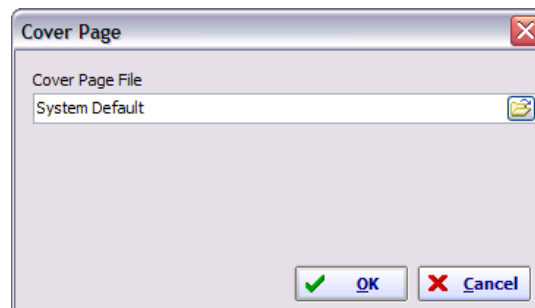
To configure Reform to use attachments with Captaris RightFAX, click on the **Attachment Setup** button beside the **Transport Type** dropdown list in Page Setup to call up the Attachment Setup dialog box. The Attachment Setup dialog allows you to choose from various file types, resolutions and color formats for your attachments.

The recommended attachment type for the RightFAX plugin is a TIFF image with Group 4 compression.

Note: You can change the Color format to Gray Scale or Color, but you will experience a noticeable speed difference.

Fax Cover Page

To use the RightFAX cover page in your faxes, select **Fax Cover Page** under the **Automation** submenu of the **Options** menu as usual. Instead of browsing for a cover page, type in the fax cover name that exists in your RightFAX System. To use RightFAX's default cover page, type **System Default** in the Cover Page File box, as pictured below.



Note: The RightFAX Client must be installed on the computer running Reform. Reform communicates with RightFAX using Port 445; this port must be white listed if any firewalls are running.

Optional Test

To test the functionality of RightFAX once you have followed the directions above: Start the Reform Spooler by clicking the **Spooler** icon under **Reform Enterprise V12** in your programs list.

Copy the **RightFAXPO.out** file from the C:\Program Files\Reform_Enterprise_V12\Backups directory into the C:\Program Files\Reform_Enterprise_V12\Spooler directory. At this point, the Reform Spooler should send 15 Purchase Orders in 10 separate fax jobs to RightFAX using the phone number 555-555-5555.

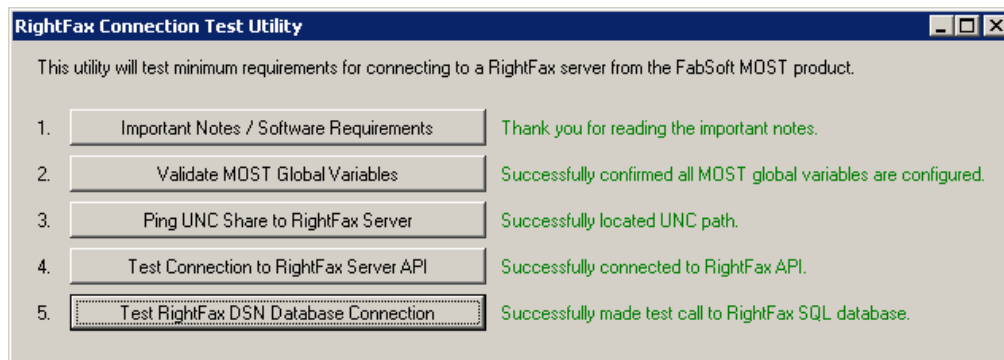
To view the form used for this test, open **RightFAXPO.fom** in Reform Designer and select **Yes** when prompted to open the associated text file.

To view fax results, use Windows NotePad to view **PrintResults.txt** in the **Reform** directory after the fax job is completed.

RightFAX Connection Test Utility

This included Connection Test Utility is used to check the integrity of various settings when setting up a MOST server to work together with RightFAX. It checks several settings to make sure that they are configured properly. If there is some kind of issue with the MOST and RightFAX servers communicating, this utility can be used to isolate a problem and fix it.

Keep in mind that this Connection Test Utility is only intended for workflows that are using RightFAX integration together with MOST.



1. Displays some information that should be read before proceeding.
2. Checks to see that you have correctly set the necessary Global Variables from within the MOST Designer application.
3. Verifies that you are able to write to the shared directory on the RightFAX Server where fax jobs are sent.
4. Checks to make sure that a connection can be established between the MOST server and the RightFAX server.
5. Checks the integrity of the connection between the MOST server and the RightFAX database.

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