

12/01/2010

Reform.12

Modular Object Scanning Technology



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System Requirements

- Reform 12 Enterprise or Reform 12 PDC
- RightFax Plugin
- Most Plugin
- For Evaluation and Demonstration: Windows XP, Windows 2003 Server, Windows Vista, Windows 7 or Windows 2008 Server (64 Bit Operating Systems are Supported)
- For Production Systems: Windows 2003 Server or Windows 2008 Server (64 Bit Operating Systems are Supported)

All required Reform software downloads can be found at www.fabsoft.com >> Downloads section.

Hardware Requirements

Please reference both the RightFax Plugin Documentation and MOST Documentation regarding Hardware Requirements.

Other Requirements

- MOST and RightFax plugins must be configured before installing.
- RightFax Util must be installed and operational.

Installation

To install Most-RightFax to your existing Reform 12 installation, you will need to download and run the MOST-RightFax installation executable.

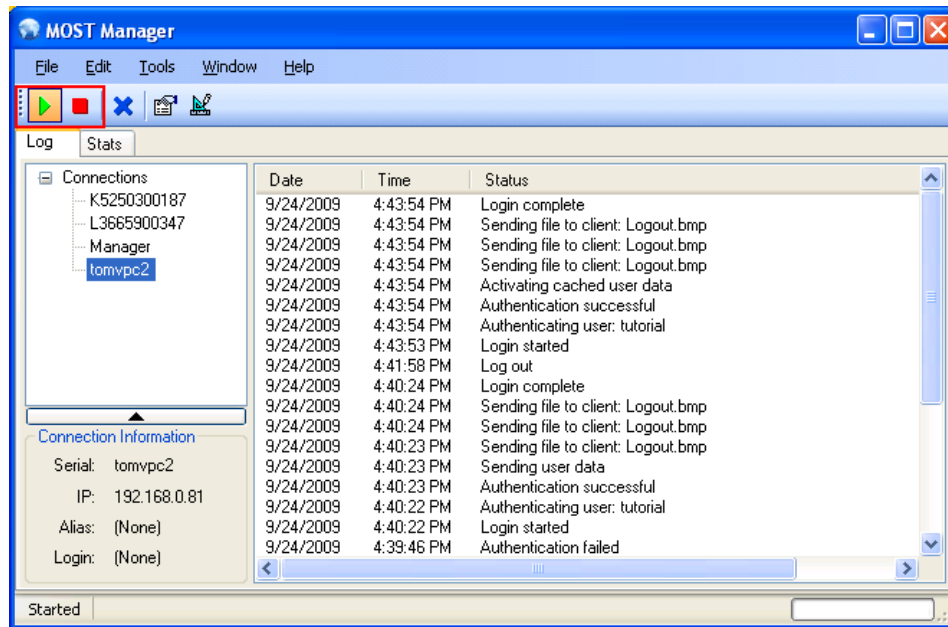


Step through the prompts, and the installation will begin.

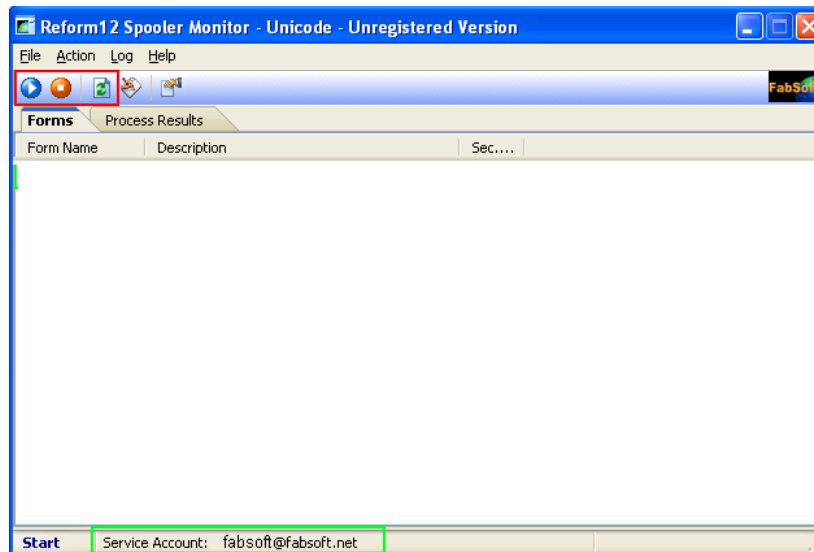
The default installation directory for Reform 12 and its plugins is **C:\Program Files\Reform...**. If you have changed the path during the Reform installation routine, or if you are using a 64 bit operating system, please refer to the appropriate path instead of the default one referenced throughout this documentation.

After the installation, open the MOST Manager by going to Start>Programs>Reform...>MOST>Manager. The MOST Manager should be restarted

(if running) as it requires newly added files to be loaded upon startup. Press the red Stop button and then the green Start button to do so.

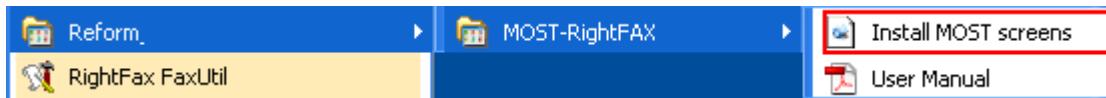


The Reform Spooler Service must also be restarted. Open up the Spooler by going to **Start>Programs>Reform..>Spooler**. Click the **Refresh** button or the red stop button and then the blue start button.

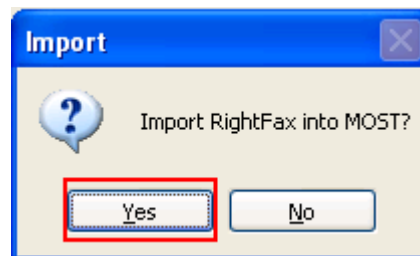


Importing RightFax Screens into MOST

We need to import the MOST screens for RightFax. To do so, go to **Start>Programs>Reform...>MOST-RightFax>Install MOST Screens**



If not currently open, you will notice that the MOST Designer appear. When prompted if you want to import RightFax into MOST, click **Yes**.

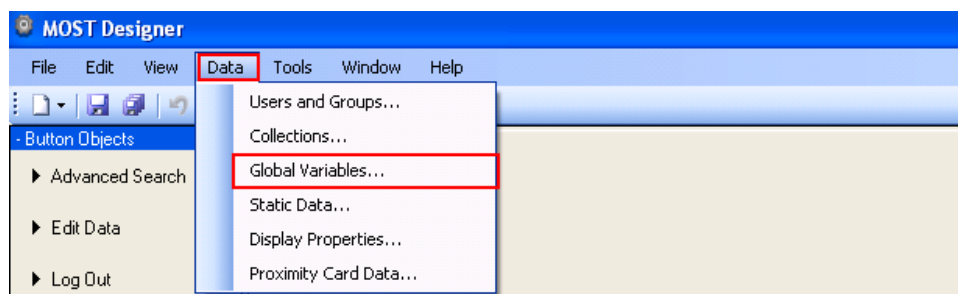


Leave the MOST Designer open as it will be used later in the tutorial.

Global Variables Setup

We must setup the **Global Variables** required for MOST and RightFax to Communicate. If the MOST Designer is not already open, go to **Start>Programs>Reform...>MOST>Designer** to start it.

In MOST Designer, Go to **Data>Global Variables**



Select each variable and enter the correct value, then click **Update**.

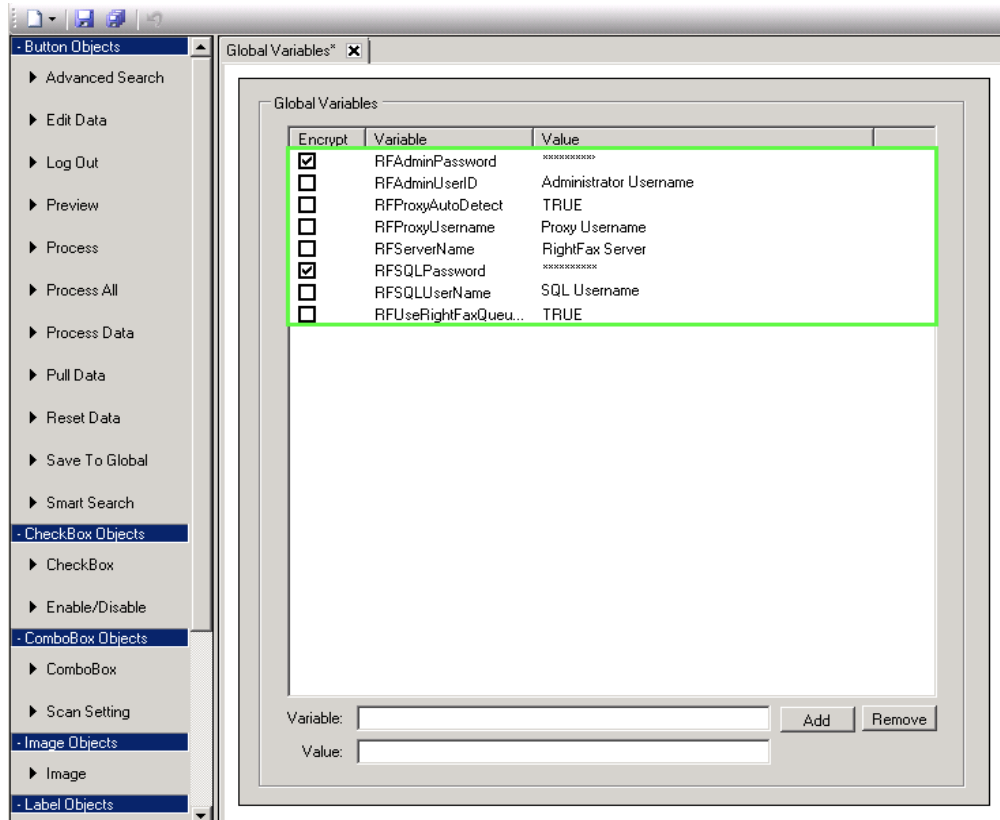
RFAAdminPassword = Your RightFax Administrator Password

RFAAdminUserID = Your RightFax Administrator UserName

RFProxyAutoDetect = TRUE

RFProxyUsername = The Proxy UserName

- RFServerName** = Your RightFax server name
- RFSQLPassword** = Your RightFax SQL Password
- RFSQLUserName** = Your RightFax SQL UserName
- RFUseRightFaxQueueSpooler**=TRUE



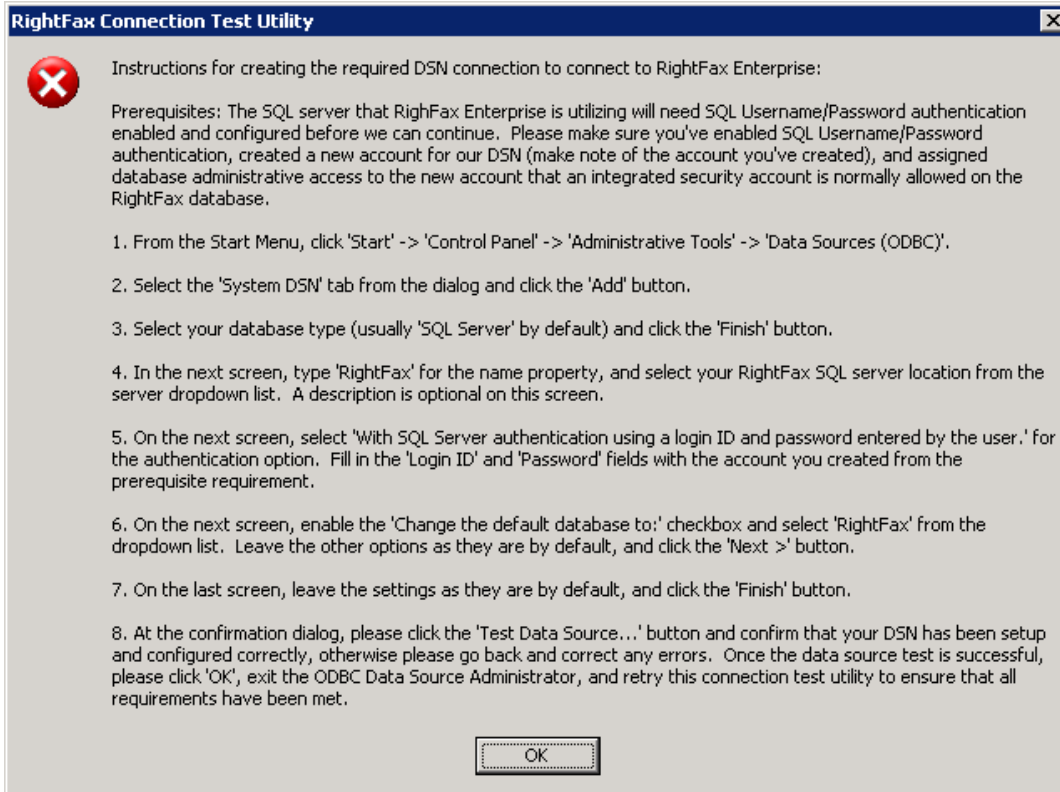
Once complete, click the **save** icon  in the Toolbar.

****If Windows/NT Authentication is being used in RightFax, it should also be used in MOST. If it is not being used, each MOST User has to have an account that matches the RightFax account. Below is an example of adding a RightFax User to MOST in order to authenticate to RightFax.****

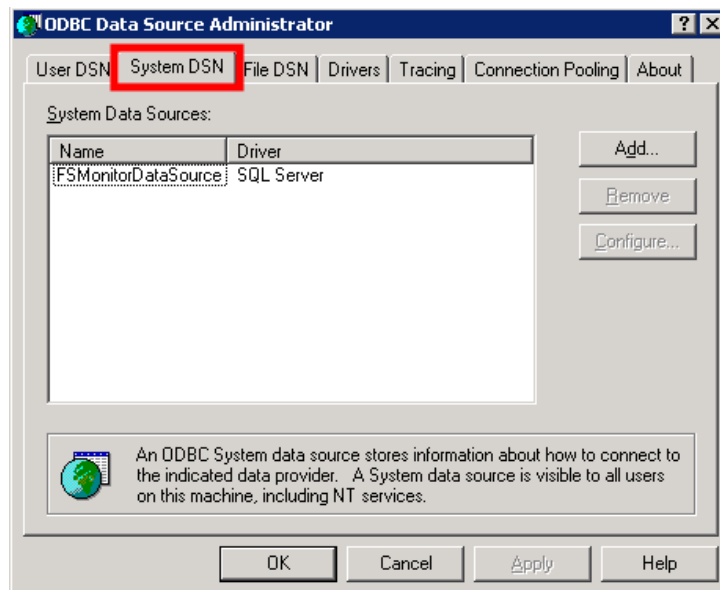
Setting up DSN Database Connection

There must be a System DSN called “RightFax” in the ODBC Data Source Administrator. You can use the SQL Username and Password authentication or the Windows/NT Authentication. This will require that the SQL server hosting the RightFax database be configured to allow such an authentication scheme.

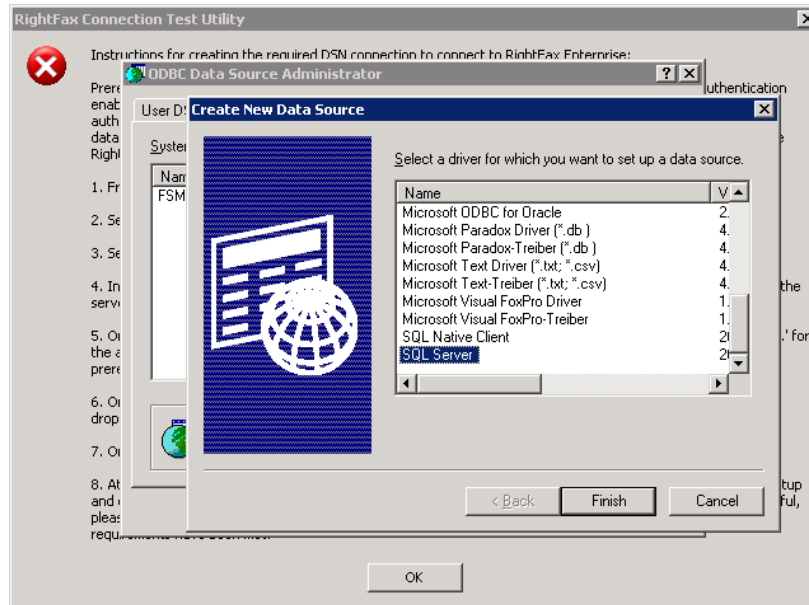
Instructions on how to setup the DSN will be displayed if Test 5 fails.



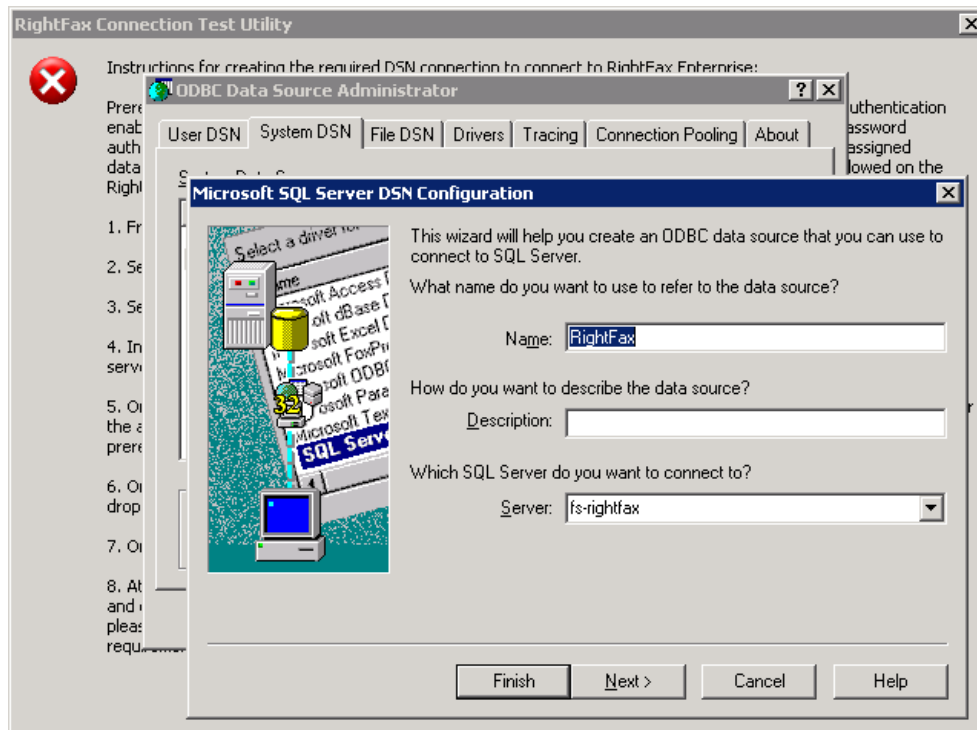
1. Go to **Start> Control Panel> Administrative Tools> Data Sources ODBC**
2. Select **System DSN** tab and click the **Add** button.



3. Select **SQL Server** and click **Finish**.



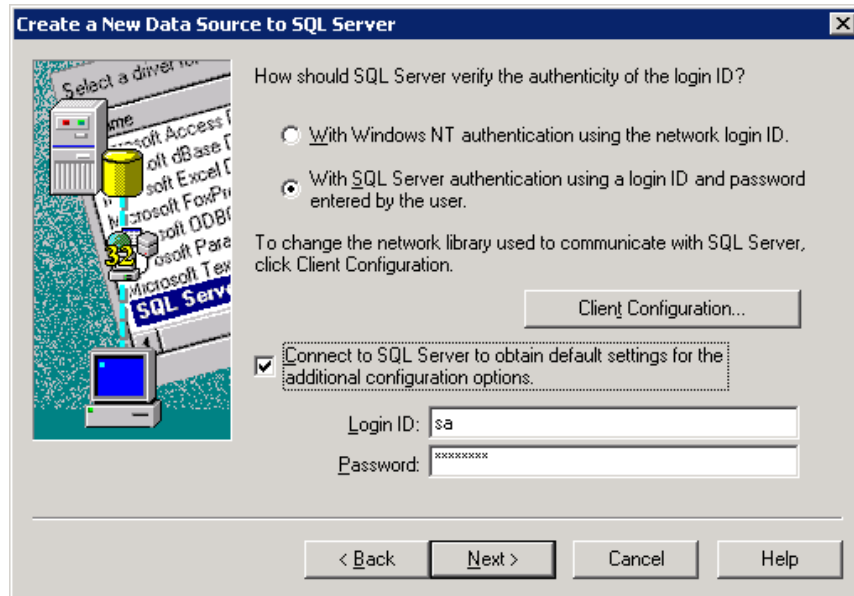
4. On the next screen, type RightFax for the name property, and select your RightFax SQL server from the dropdown list. If the RightFax server is not on the list, type in your RightFax server name.



5. Depending on your environment, you can use Windows NT Authentication or the SQL Server authentication. For the tutorial we will show you both.

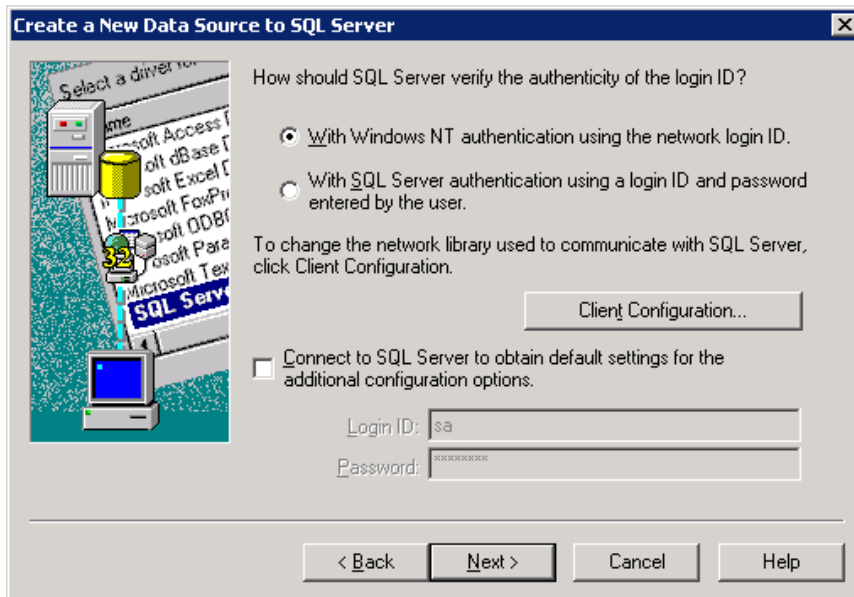
6. **A) Using SQL Server Authentication**

Select *With SQL Server authentication..*, Check *Connect to SQL Server to obtain default settings for the additional configuration options* and enter your SQL login ID and password. Click **Next**.

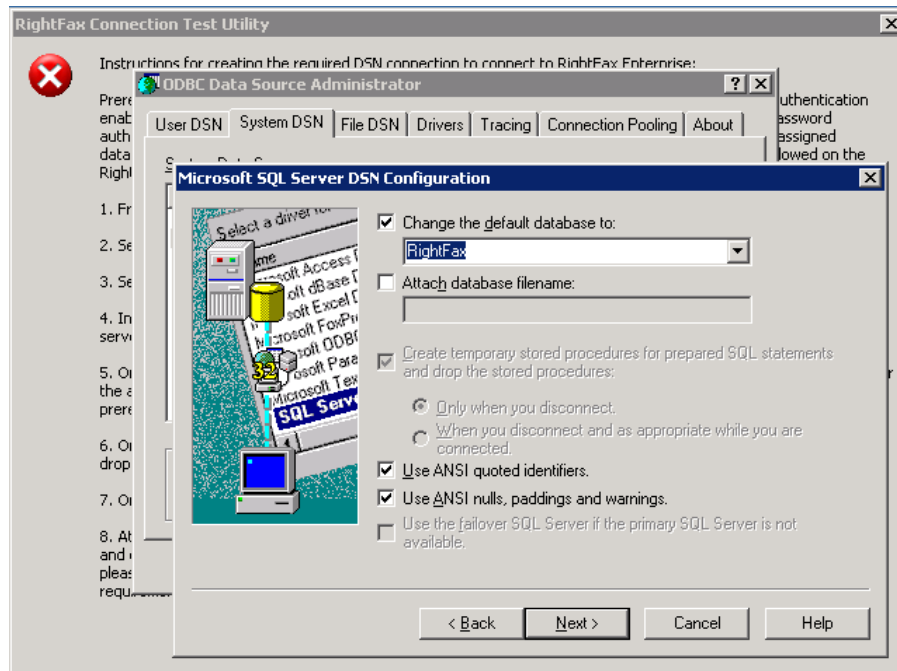


B) Using Windows NT authentication

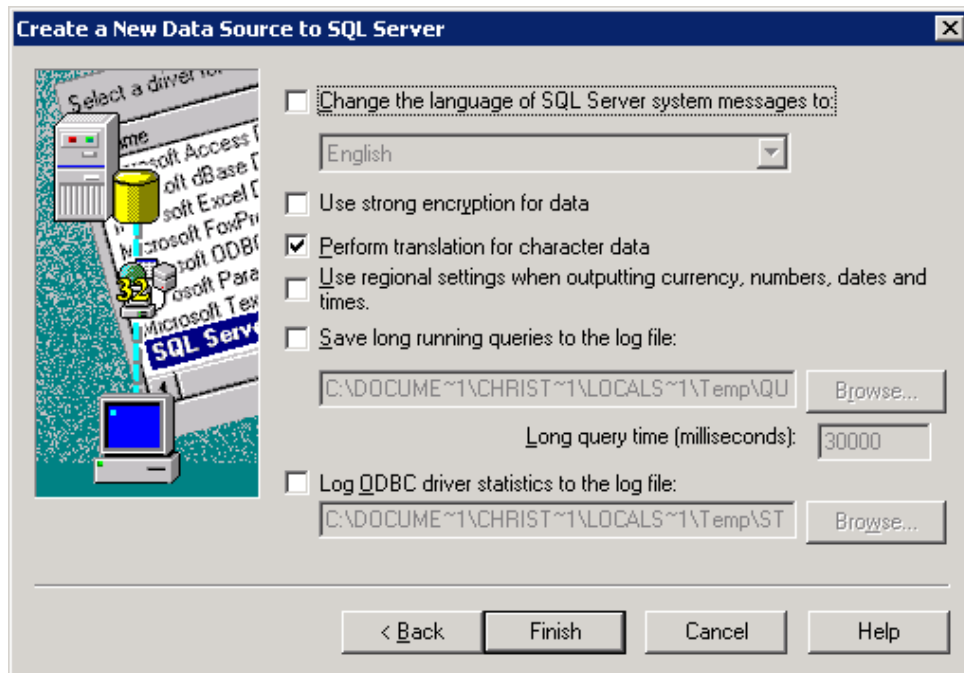
Select *With Windows NT authentication..* Click **Next**.



7. Check, Change the default database to the RightFax database. Click **Next**.



8. On the next screen, click **Finish**.

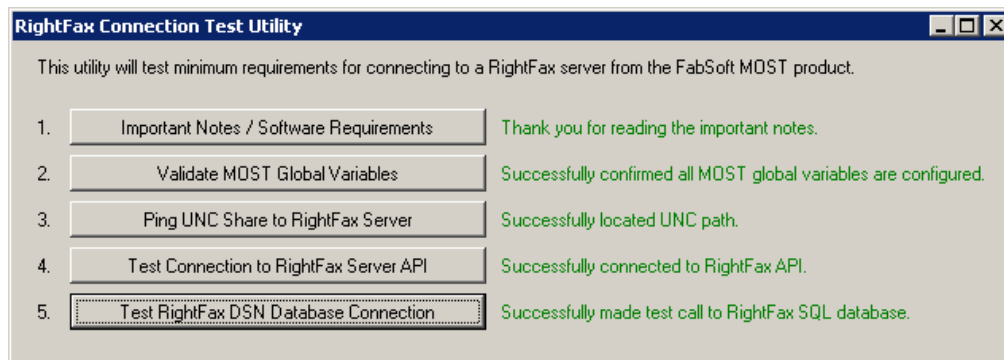


RightFax Connection Test Utility and Setup

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 fixing it.

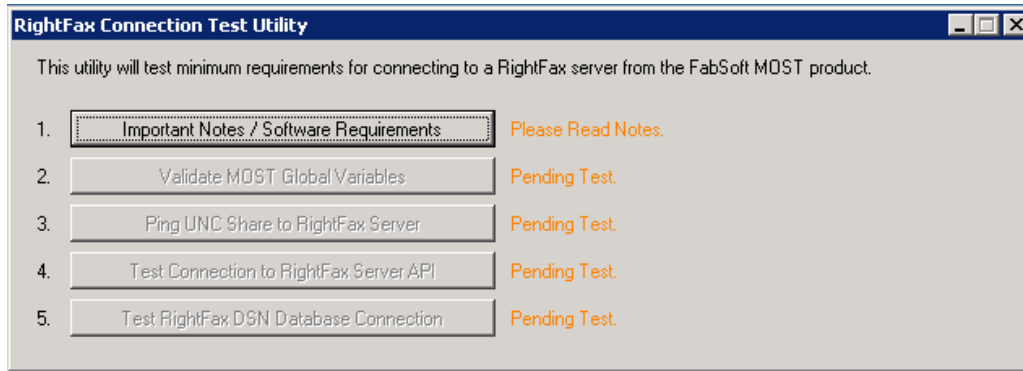
To run the RightFax Connection Test Utility: **Start>Programs>Reform...>MOST-RightFax>Connection Test**

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

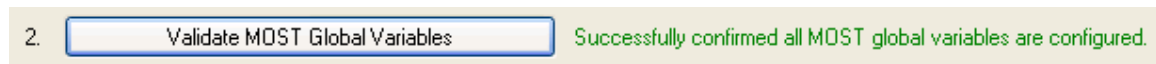
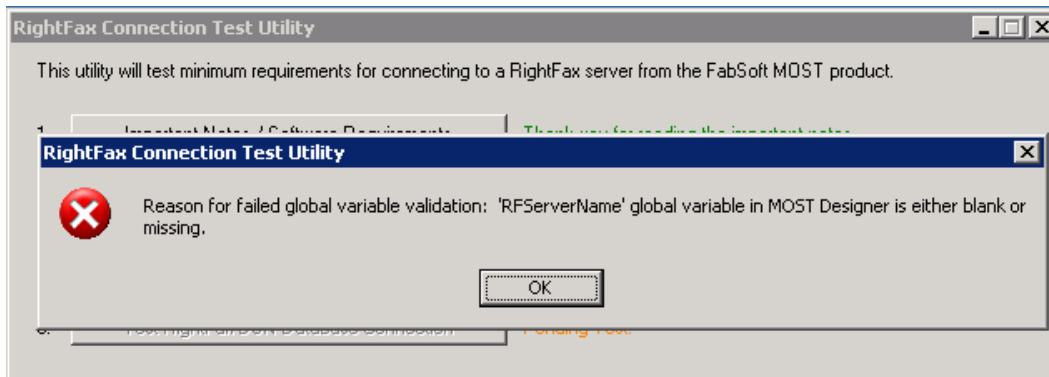


1. Displays some information that should be read before proceeding.
2. Checks to see that you have correctly set the necessary Global Variables from within the MOST Designer application.
3. Verifies that you are able to write to the shared directory on the RightFax Server where fax jobs are sent.
4. 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.

Go to **Start>Programs>Reform...> RightFax>Connection Test**

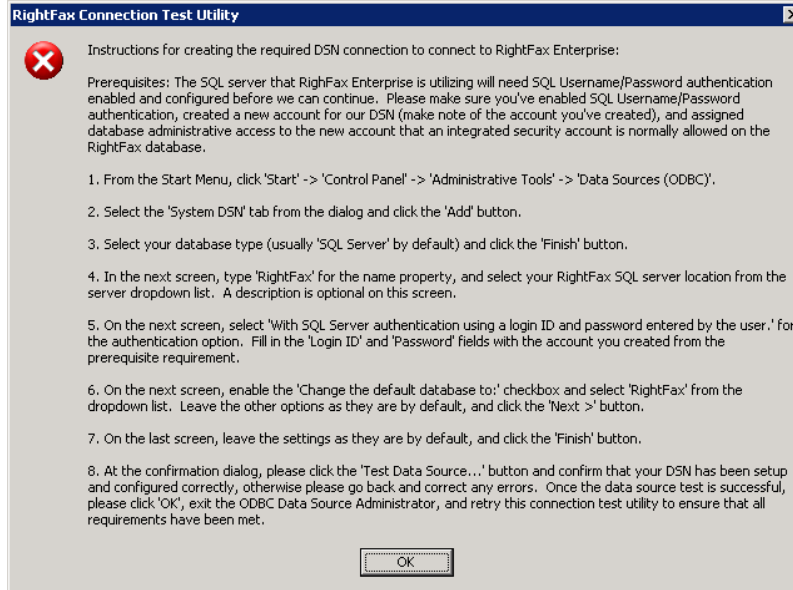


Test #2 Global Variable Validation – If the message below occurs, go back to the previous section to make sure the Global Variables are set correctly.

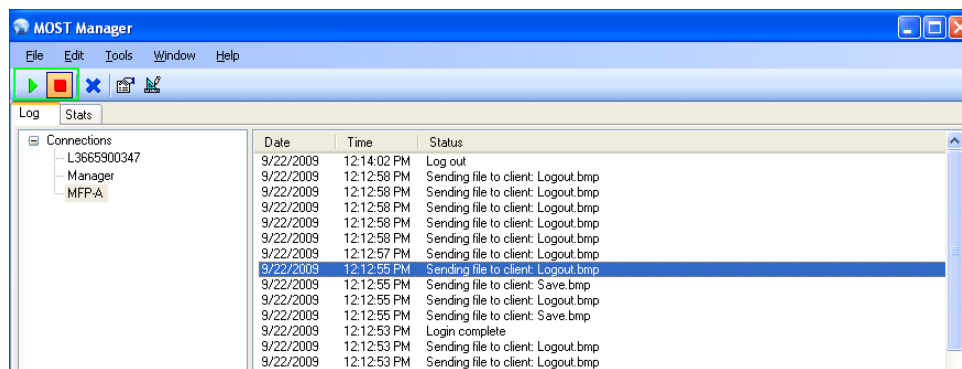


Test 3 & 4 should passed without additional input from the user.

Test 5 If the message below occurs, go back to the previous section to make sure the DSN are set correctly.

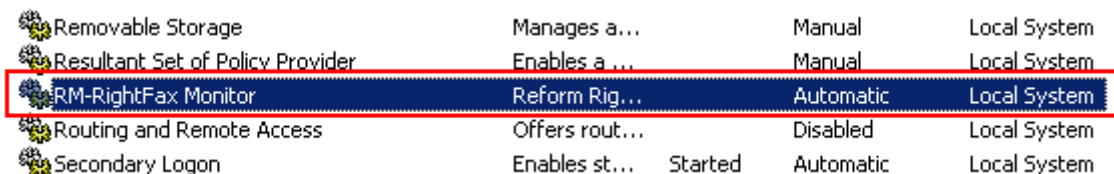


To make all the changes take effect at the Server, the MOST Manager must be restarted. Please **Stop** the MOST Manager and then **Start** it. Note: If you are using the Windows/NT Authentication you're MOST service should be running under the same account.



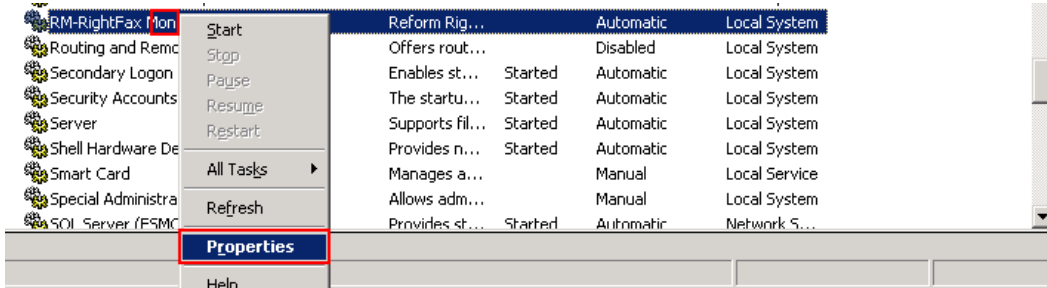
MOST RightFax Monitor Service

The RM-RightFax Monitor service is installed with the MOST-RightFax installation. You can verify that the service is installed and running by going to Services in Administrative Tools (Control Panel) or by going to **Start>Run** and typing services.msc.

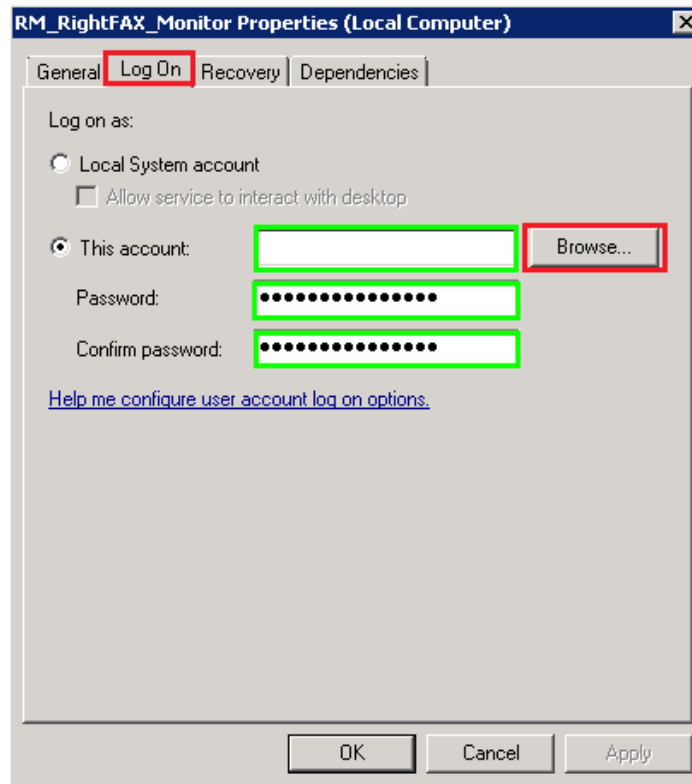


This service installs as a local system account by default and is recommended to have local administrative rights to function properly. Depending on your environment, you may need to change the login account for this service to an administrative account. Note: If you are using the Windows/NT Authentication for your DSN connection your MOST service should be running under the same account.

To change the service Log On, right click on the service and go to **Properties**.

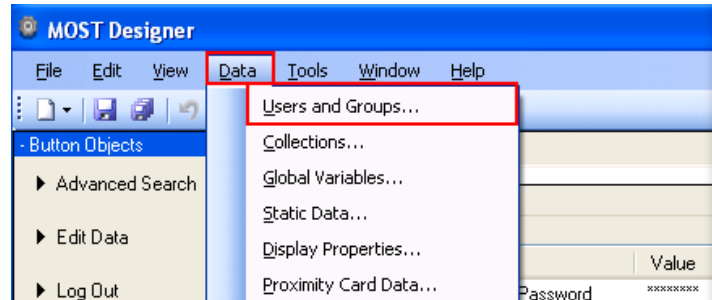


Next, go to the **Log On** tab and use the browse button to search for an account that has administrative access. Fill in the rest of the credentials and click **OK**. You will be notified that the service has to be restarted for the changes to take effect. Please restart the service by stopping it and then starting it back up. Once started, you can close the services window.



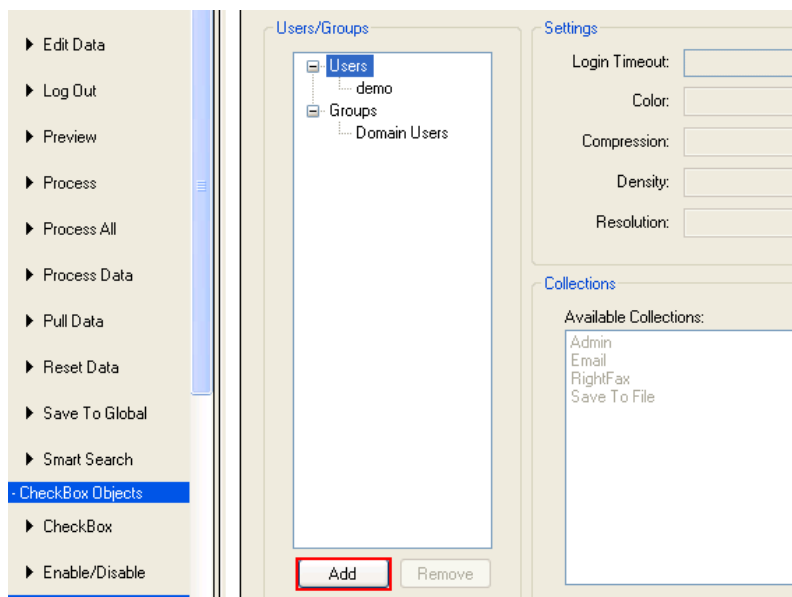
Adding RightFax users to MOST

As an example of adding RightFax users to MOST, we want to add the user administrator to the MOST Users and Groups.. In the MOST Designer, go to **Data>Users and Groups**

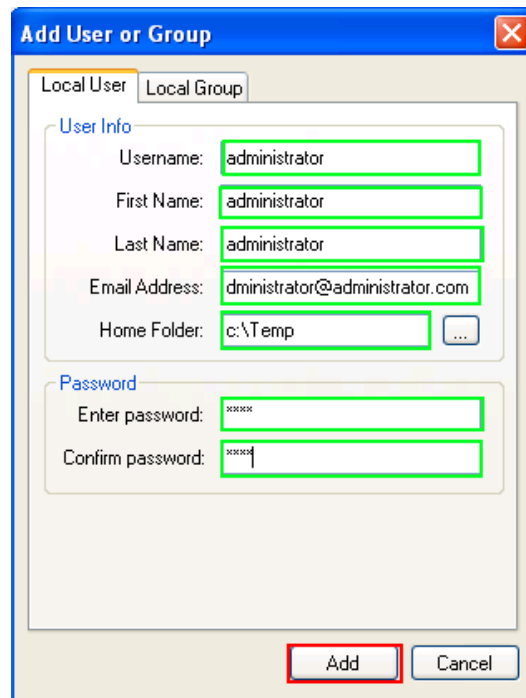


If using Windows/NT Authentication on both MOST and RightFax, proceed to Step B.

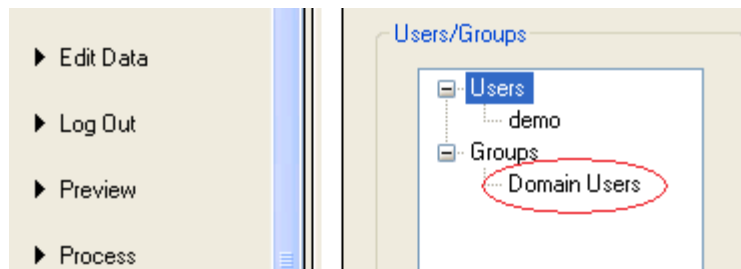
- A. Click the **Add** button.




Enter the user’s RightFax information. The Username is their RightFax Username. Their Password is their RightFax Password. Click **Add** once complete.



Select **Domain Users**



After adding the user administrator or Domain Users, highlight RightFax from the Available Collections and click the right arrow button to make that collection available for administrator or LDAP users.

Click on the **Save** icon  and close the Designer window.

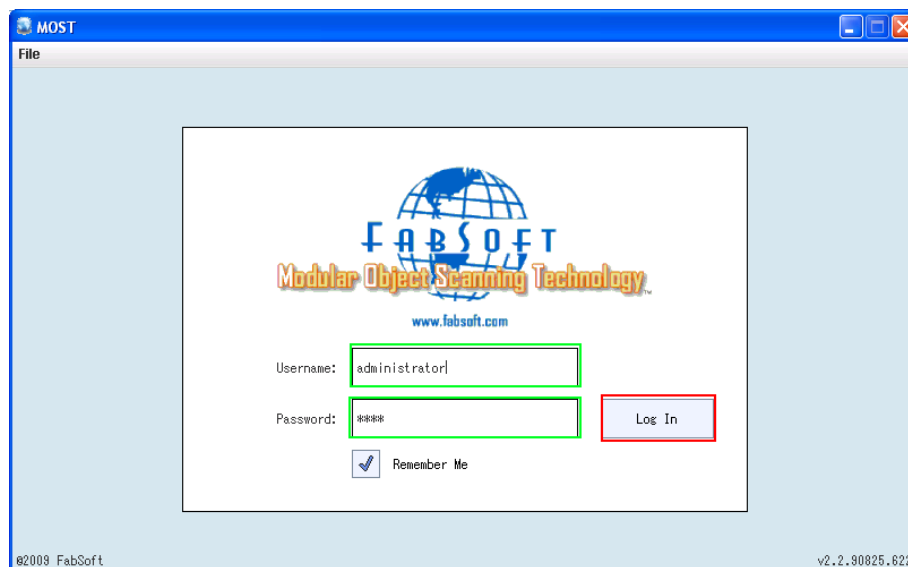
MOST RightFax Tutorial

(Go to <http://www.fabsoft.com/products/most/MOSTRightFax.html> to view the MOSTRightFax demo video)

In this tutorial, we are going to show how MOST integrates with RightFax.

1. Login to MOST at an MFP or use MOST Desktop (**Start > Program > Reform...>MOST>Misc>MFP Emulator**) using the following credentials if you created the administrator user. If not, login using NT Authentication(LDAP) but make sure your RightFax server is also using the same username and password.

Click Log In.



2. Make sure you are on the RightFax Screen. First thing we want to do is go to the add contacts tab. On the left, click on **Add PB** tab and fill out fields with the following information.

Name: John Doe

Company: Xyz Inc.

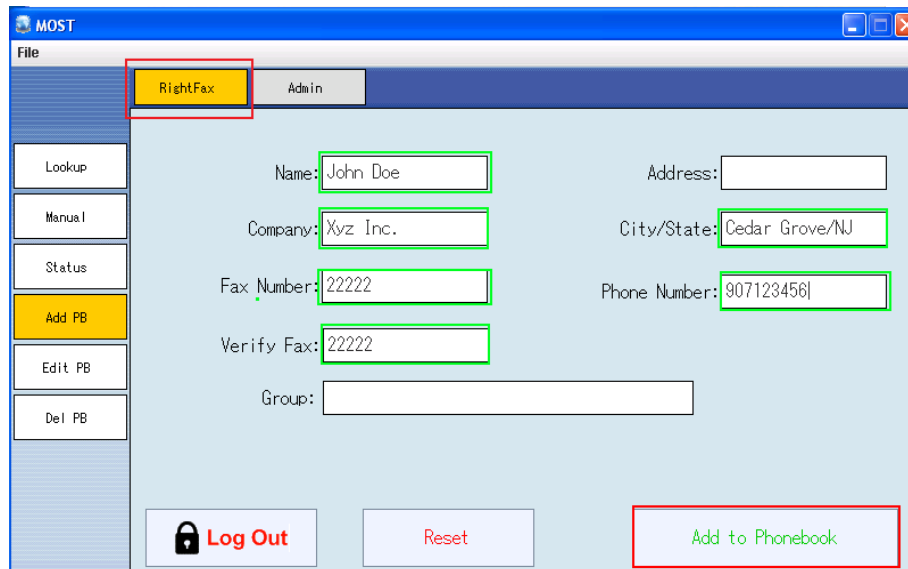
Fax Number: Enter a valid fax number

Verify Fax: Enter the same fax number entered above

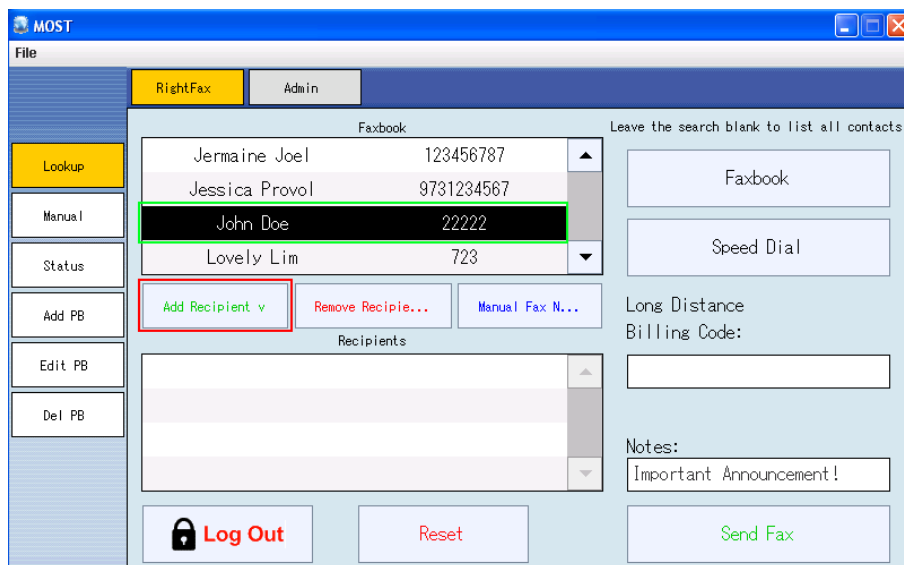
Phone Number: 9071234567

City/State: Cedar Grove/NJ

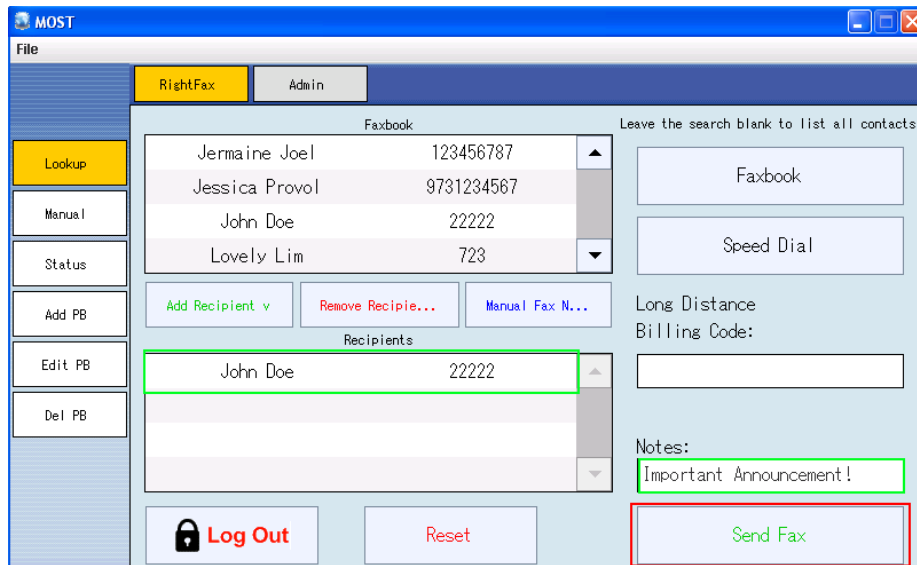
With the information filled out, Click the **“Add to PhoneBook”** button.



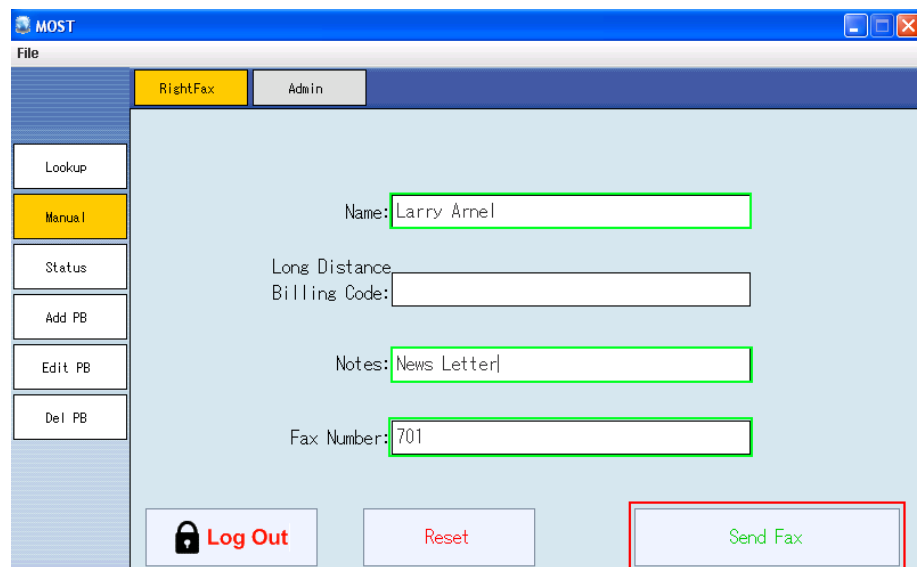
3. On the left, click on **Lookup** tab. Select the contact you just added from the listbox and click on Add Recipient button to populate the Recipients box.



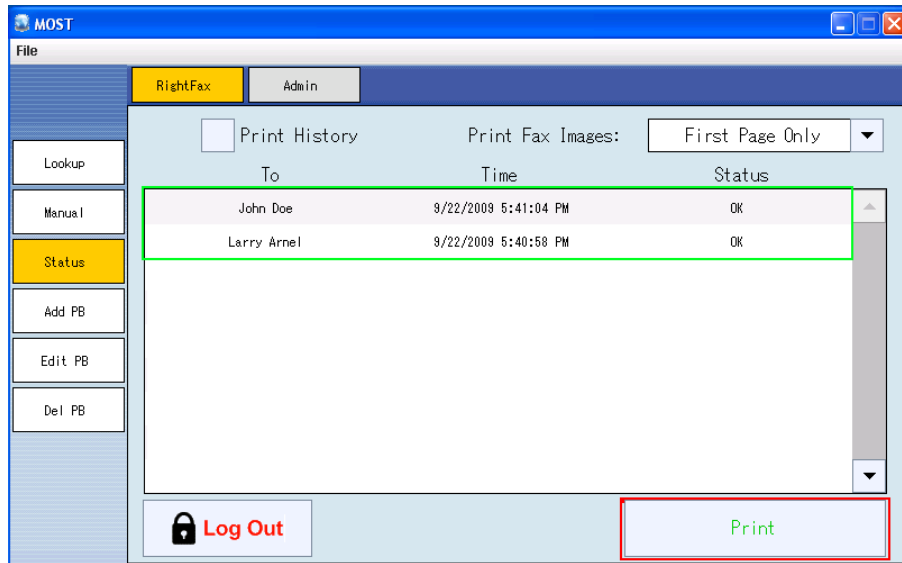
4. You will notice that Recipients have been populated with the fax book entry you have chosen. Now, on the Notes field type in *Important Announcement!* and click **Send Fax**.



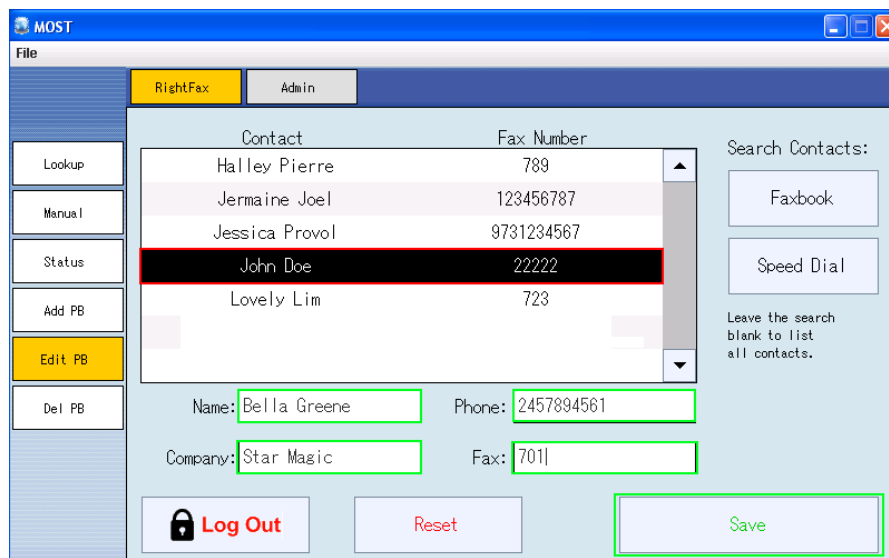
5. We also want to send another faxing using the Manual tab. Here, you can manually send a single fax. On the left, click on the Manual tab and fill out the fields. Click on **Send Fax** button.



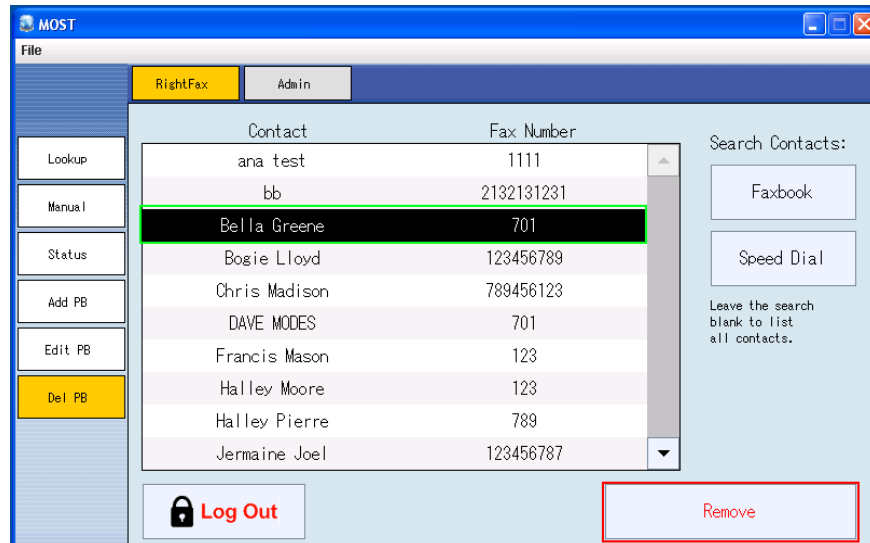
6. Wait a moment and then click on Status on the left hand side to view the statuses of the two faxes you have just sent.



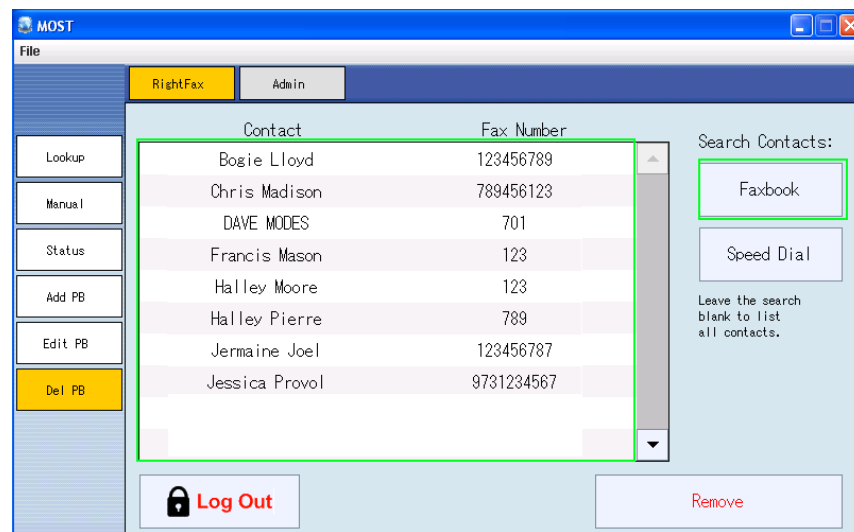
7. Select one of your documents from the list. You also have an option if you just want to see the first page of the fax document or all pages and an option to print the transmission history of the document using the **“Print History”** checkbox. Click on **Print**. The first page will print the status of your fax followed by your document.
8. Next we will edit the contact **“John Doe”** which we had created. On the left Click on **Edit PB**, and select the contact to be edited. We will edit the following fields by replacing with these new values: **Name** = Bella Greene, **Company** = Star Magic, **Phone**=2457894561 and **Fax**=701. Click on **Save**. Wait a few seconds and click on **Faxbook**, leave the search field blank to refresh the list. You should be able to see the changes you made.



- Finally, we will delete a contact. On the left Click on Del PB. Your faxbook should be populated automatically. Select a user from the faxbook that you want to delete. We will be deleting **"Bella Greene"**, the user we had just edited. Click the **Remove** to complete the process.



- To verify that the contact was deleted, wait a few seconds and then click **Faxbook** (leave the search blank). Your results will be populated and your deleted contact should no longer exist.



- You have completed the simple tutorial on how to use the default RightFax screens.

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