

**OPENTEXT**

**OpenText RightFax 10.6**

**Lotus Notes Module**

**Administrator Guide**

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**Edition**

OpenText RightFax 10.6 Lotus Notes Module.

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Open Text Corporation  
275 Frank Tompa Drive  
Waterloo, Ontario, Canada  
N2L 0A1  
(519) 888-7111  
<http://www.opentext.com>

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# Contents

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<b>Chapter 1: Understanding the RightFax Lotus Notes Module</b> .....	<b>5</b>
Notes Integration Options .....	5
Understanding the fax factory .....	6
<b>Chapter 2: Installing the Lotus Notes Module</b> .....	<b>8</b>
<b>Installation Requirements</b> .....	<b>8</b>
Installing the Lotus Notes Module .....	8
Installation Requirements .....	8
Installing and Integrating a RightFax Server .....	10
Configuring the Notes E-mail Gateway to work with the Midas C++ API .....	14
Upgrading from a Previous Integration .....	14
Uninstalling the Notes Module .....	15
Using RightFax Data Sharing with Lotus Notes .....	15
<b>Chapter 3: Configuring the EFM Sync Database</b> ...	<b>16</b>
Understanding EFM Sync Database Security .....	17
Configuring your RightFax Integration .....	18
Configuring fax user groups .....	18
Adding and Configuring Users .....	18
Importing users from the Names and Address Book ...	19
Creating routing codes .....	20
Configuring the RightFax Server .....	21
Configuring the RightFax Gateway Document .....	24

---

Configuring RightFax Objects in Notes .....	30
Handling Undeliverable Faxes .....	30
<b>Chapter 4: RightFax Logs and Reports in Lotus Notes</b> .....	<b>32</b>
RightFax Event Logs .....	32
RightFax Status Reports .....	33
<b>Chapter 5: E-mail Compatible Embedded Codes</b> ..	<b>35</b>
ATDATE + .....	35
ATTIME + .....	36
BILLINFO1 (BI1) + .....	36
BILLINFO2 (BI2) + .....	36
CHANNEL + .....	36
COVER + .....	37
DELETE + .....	37
DELETEALL + .....	37
FCSFILE + .....	37
FINE + .....	37
FROMFAXNUM + .....	37
FROMGENFAXNUM + .....	37
FROMGENPHONE + .....	38
FROMPHONE + .....	38
IGNORE + .....	38
LIBDOC + .....	38
LIBDOC2 + .....	38
NOCOVER + .....	38

---

NORMAL + .....	38
PREVIEW + .....	39
PRIORITY + .....	39
RETRYCOUNT .....	39
RETRYINTERVAL .....	39
SAVE + .....	39
SMARTRESUME .....	39
<b>Chapter 6: File Formats that Convert to Fax Format .....</b>	<b>40</b>

# Chapter 1: Understanding the RightFax Lotus Notes Module

**Note** The RightFax Lotus Notes Module Guide augments the administrator and user help that accompanies the RightFax Lotus Notes Module. For information on topics not found in this guide, see the admin and user help. Shortcuts to administrator and user help are created during the Notes installation and are located on the Notes workspace.

The RightFax Lotus Notes Module provides inbound and outbound faxing via RightFax from the Notes or iNotes clients. The RightFax Lotus Notes E-mail Gateway and a Notes client are installed on the RightFax server. Using the Notes client, the gateway logs on to the Domino server, routes incoming faxes as memos to Notes client mailboxes, and picks up fax-bound memos and delivers them to the RightFax server for conversion to fax format and transmission.

Sending a Notes mail message to a fax number, email address, or mobile device as an SMS message is similar to sending mail, except that the message is specially addressed.

The RightFax Lotus Notes Module installs several RightFax-specific database files on the Domino server. One of these files (RFAXSYNC.NSF or "EFM Sync") can be synchronized with the RightFax, thus allowing for configuration and

administration of RightFax from your Notes server or your RightFax server.

Users can compose faxes when disconnected from the Domino server (for example, using a laptop) and also have many other options, including previewing a fax before sending and forwarding a fax that was sent to them.

For detailed information on how to use RightFax to send and receive faxes, documents, and SMS messages, see the *user help* that accompanies the RightFax Lotus Notes Module.

**Note** Sending RightFax messages of type "Document" (for Certified Delivery) requires that the recipient have an SMTP e-mail address, and sending RightFax messages of type "SMS" requires that the recipient have a cell phone number. Either of these can be picked from the Domino Directory or from the Personal Address Book. If the required information is absent, the user does not appear in the address of the memo after the Addressing dialog box is closed.

## Notes Integration Options

You have the following options for integrating faxing with RightFax in your Notes system. Instructions for each of these options are provided later in this section.

- **Full Mail Integration** With a full integration, the RightFax setup adds RightFax forms, subforms, and agents to the Notes mail template to create a RightFax template. Notes users can use this template, which is known as the RightFax advanced form, to send a fax from Notes. The Domino server composes outgoing faxes and stores outgoing and incoming faxes in each user's Notes mail database. RightFax also stores outgoing and incoming faxes in its own database. A full

integration also adds a special document named User Options to each user's mail database. Users can edit their copies of this document to configure their personal fax settings.

- **Minimal Mail Integration** With a minimal integration, fax composition occurs in a fax factory database that is installed locally on the user's computer. To send a fax, users use a basic RightFax form. The fax factory composes the fax. As in the full integration, outgoing and incoming faxes are stored in the user's mail database and the RightFax database. The minimal integration setup adds the following new components to the user's mail database: An agent (Actions>Fax Tools>New RightFax Document, Fax, and SMS), an agent (Actions>Fax Tools> Real-time Fax Status), one shared folder (RightFax Settings), and RightFax User Options document (located in the RightFax settings folder). For more information about a minimal mail integration, see [Understanding the fax factory](#) on [page 6](#).
- **No Mail Integration** With no-mail integration, users send memos as faxes with the standard Notes Memo form and RightFax embedded codes that users type into the body of the memo. Faxes are moved to the Domino server by means of foreign domains that users include when addressing faxes. The RightFax databases on the Domino server route documents with fax addressing to the RightFax server. No modifications to any Notes mail template or any users' mail databases are required. Fax documents are stored both in the RightFax database and in the user's Notes mail database.

Users address faxes by using one of the following formats:

- *RecipientName@fn=Fax Number@FaxDomain*
- *fn=Fax Number@FaxDomain*

For more information about setting up foreign domains for faxing, see [Creating RightFax foreign domains](#) on [page 13](#).

- **iNotes Integration** The RightFax Lotus Notes Module supports Lotus iNotes (also called Domino Web Access) in a minimal-mail integration. This allows for fax usage via a web browser, including sending and viewing faxes, and setting advanced fax attributes.

## Understanding the fax factory

If you choose minimal Notes Mail integration, the fax factory database is installed to improve the efficiency of the Domino server by moving fax composition tasks to the user's computer. A local fax factory database is installed on each client computer, and a central fax factory template database is installed on the Domino server.

The user's local fax factory database is kept up to date by inheriting its design from the fax factory template. This permits the fax administrator to update the user's fax factory when needed, rather than the Notes mail template.

User-specific data and fax preferences are stored in the User Options document in the EFM Sync database. When a user opens his personal User Options document in his Notes mail database, the current data is pulled into the document from the EFM Sync database. The User Options document is stored in the mail database and has a stored form so that modifications to the database design are not required. When

the user saves changes, the data is updated in both the EFM Sync database and the local fax factory database.

The user composes a fax by activating an agent stored in his mail database. The agent directs composition of the document to the local fax factory database. When saved or sent, the fax is stored in the user's mail database.

Outbound fax documents are delivered via standard Domino mail mechanisms to the database specified in the fax foreign domain document. Fax rendering and delivery out of the Domino environment are handled by the gateway service on the RightFax server. This frees Domino server resources for Lotus Notes and Domino tasks.

Inbound fax documents are processed by the Lotus Notes module on the RightFax server and stored in the RightFax Mail Router database. Faxes are passed from the RightFax Mail Router database to the Domino router task for standard Notes mail delivery. Because delivery is the only task handled by the Domino server, fax traffic only impacts the Domino mail router task.

# Chapter 2: Installing the Lotus Notes Module

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## Installation Requirements

### RightFax Requirements

- RightFax 10.6 with the latest Feature Packs and service releases applied.
- Do not run the Lotus Notes Module installer (RFINSTALL.NSF) on the same computer as the RightFax server.

### Lotus Notes Requirements

- Lotus Domino server R8.5, R8.5.1, R8.5.2, or 8.53. Your Domino server and RightFax server should be located on separate computers.
- Lotus Notes R8.5, R8.5.1, R8.5.2, or 8.53 clients, one or more installed on the RightFax server or a remote e-mail gateway server.
- Install from a client that is running the same client version as the Domino Server version. For example, if your Domino Server is running version 8.5.1, install RFINSTALL.NSF from a client that is running version 8.5.1.

- If you are running the Lotus Notes module in a clustered Domino server environment, note that faxes that are sent during a failover of the node used to install the RightFax gateway are confined to the MAIL.BOX of the active node (i.e., used by the Notes clients). When the node used to install the RightFax Gateway is returned to service, those faxes are processed according to your Domino Connections document configuration. For instructions on configuring your Connections document, see Domino documentation .

## Installing the Lotus Notes Module

### Installation Requirements

#### RightFax Requirements

- RightFax 10.6 with the latest Feature Packs and service releases applied.
- Do not run the Lotus Notes Module installer (RFINSTALL.NSF) on the same computer as the RightFax server.

#### Lotus Notes Requirements

- Lotus Domino server R8.5, R8.5.1, R8.5.2, or 8.53. Your Domino server and RightFax server should be located on separate computers.
- Lotus Notes R8.5, R8.5.1, R8.5.2, or 8.53 clients, one or more installed on the RightFax server or a remote e-mail gateway server.
- Install from a client that is running the same client version as the Domino Server version. For example, if your Domino Server is running version 8.5.1, install



RFINSTALL.NSF from a client that is running version 8.5.1.

- If you are running the Lotus Notes module in a clustered Domino server environment, note that faxes that are sent during a failover of the node used to install the RightFax gateway are confined to the MAIL.BOX of the active node (i.e., used by the Notes clients). When the node used to install the RightFax Gateway is returned to service, those faxes are processed according to your Domino Connections document configuration. For instructions on configuring your Connections document, see Domino documentation .

### Lotus Notes User Requirements

The person performing the install and Notes configuration is required to have the following access rights:

- Designer in the ACL of the mail template to be modified.
- Editor in the ACL of the NAB.
- Ability to create both new and replica databases on the Domino server connecting to the module client.
- Ability to create and modify Group documents in the NAB.
- Ability to create and modify a fax foreign domain document in the NAB.
- Ability to run unrestricted Lotus Script and Java agents on the Domino server that hosts the module databases.
- Manager access to all mail database files of all imported iNotes users.

Each fax user is required to have:

- Author access in the ACL of the RightFax EFM Sync database on the Domino server.
- Ability to connect to the Domino server EFM Sync.
- Manager access in the ACL of their mail database. iNotes users are required to have a minimum of Editor access and the ability to run unrestricted ` Script and Java agents on the host Domino server.

### Regional Language Requirements

The Notes content language setting defines a regional dialect e.g., French (Canada) or French (France). Before installing the RightFax database files, verify the content language setting of the Notes client you install RightFax with, is configured to use a language supported by RightFax (shown below). For more information about the Notes content language setting, see Lotus Notes help.

Notes content languages supported by RightFax

- Chinese (China)
- English (United States)
- French (Canada)
- French (France)
- German (Germany)
- Italian (Italy)
- Japanese
- Portuguese (Brazil)
- Spanish (Mexico)

### Full Mail Integrations and Domino Language Packs

If your organization plans to implement a full mail integration and the Domino server hosting the RightFax database files has four or more language packs installed, you cannot build

an optional full mail template. Create a new connection using the *Full* integration profile shipped with RightFax. For more information about creating new connections and RightFax integration options, see the RightFax Admin help, available on the Notes workspace.

## Additional Requirement for iNotes

To use the RightFax integration with iNotes, all client workstations require the Java Virtual Machine available from Sun Microsystems.

## Installing and Integrating a RightFax Server

### To install and integrate RightFax with your Lotus Notes system

1. Install the RightFax server (described in the *RightFax Installation Guide*).
2. Activate the RightFax Lotus Notes Module (described in [Upgrading from a Previous Integration on page 14](#)).
3. Choose the type of integration you want for your RightFax and Notes system (described in [Notes Integration Options on page 5](#)).
4. Configure the Notes E-mail Gateway and RightFax Server (described in [Configuring the Notes E-mail Gateway on the RightFax Server on page 10](#)).
5. Use the installer database to install the database files for your RightFax integration (described on [Installing the RightFax Database Files by Using RFINSTALL.NSF on page 11](#)). If you cannot use the installer database, the manual installation process is described in [Installing the RightFax Database Files Manually on page 13](#).

6. Configure the EFM Sync Database (described in [Configuring the EFM Sync Database on page 16](#)).

If you are upgrading from an existing RightFax installation, see [Upgrading from a Previous Integration on page 14](#).

## Activating the Lotus Notes Module

The files required by the RightFax Lotus Notes Module are installed on all RightFax servers during the server installation. Obtain licensing and activate the Lotus Notes Module to enable it.

To activate the Lotus Notes Module, use a licensed RightFax server that includes this module, or purchase and license this module separately. For information on activating new components on the RightFax server, refer to the *RightFax Installation Guide*.

## Configuring the Notes E-mail Gateway on the RightFax Server

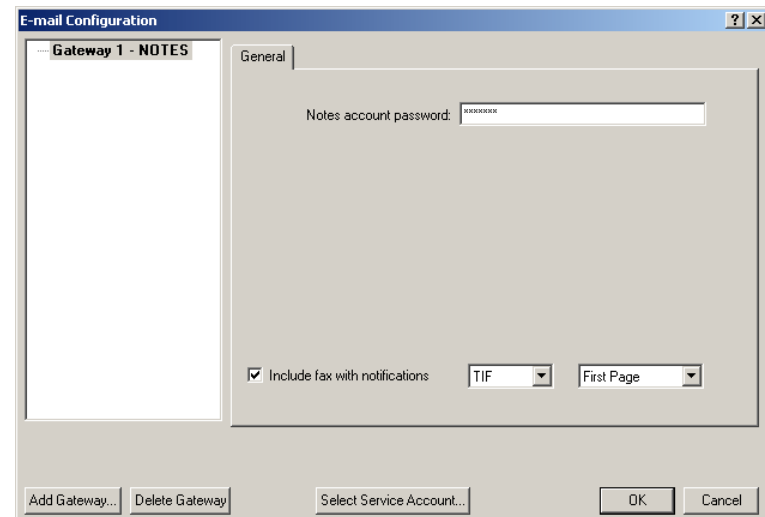
**Note** When you install the first e-mail gateway, a new service called the RightFax E-mail Gateway Module is created. This service is set to "Manual" and is started and stopped by the RightFax Server service. You can start and stop the RightFax E-mail Gateway Module service in Enterprise Fax Manager.

### To configure the Notes Gateway

1. In Windows Control Panel on the RightFax server or remote E-mail Gateway server, double-click **RightFax E-mail Gateway**. The E-mail Gateway configuration opens.
2. If you are upgrading from a previous RightFax integration with Notes, skip this step and proceed to

step 3. If you are installing for the first time, first add the Notes E-mail Gateway. To add a new gateway, click **Add Gateway**. Select Lotus Notes from the list of gateway choices and click Select. Click the Notes gateway in the left pane list to view its configuration options. Next, in the **Notes account password** field, enter the password for the User.ID file that is used by the Lotus Notes client to install the RightFax database files, and subsequently by the gateway to communicate with Domino.

3. **Include fax with notifications** applies to notifications of successfully sent faxes and faxes that failed to send. Select the check box to include a viewable copy of the fax with these types of notifications and specify the format of the copy: Select **TIF** or **PDF** format. Select **First Page** to include a copy of the first page only or **All Pages** to include a copy of all pages.
4. Click **OK**.
5. Open the \RightFax\Gateway folder and copy the RightFax database installer (RFINSTALL.NSF) to the Notes client computer installing the RightFax database files.
6. Open Enterprise Fax Manager and in the left pane, click your fax server name. RightFax services are now viewable on the lower right side of Enterprise Fax Manager. In the list of running services, right-click the RightFax E-mail Gateway and choose **Stop Service**.



## Installing the RightFax Database Files by Using RFINSTALL.NSF

### To install the database

1. Open a Notes client and log on with the Notes ID used to configure the e-mail gateway.
2. On the Notes client **File** menu, click **Database** and click **Open**. Click the browse button to locate the \RightFax\Gateway folder. Double-click the file **RFINSTALL.NSF**.
3. An Execution Security Alert appears. Click **Start trusting the signer to execute this action** and click **OK**. Do this for all remaining Security Alerts you receive during the installation.
4. The About RightFax Installation Database file opens. Click the 'X' to close this window and proceed to the RightFax Installation Database.

5. Review the comments at the Welcome screen. When finished, click **Start**. At the Step 1 window, click **Next**.
6. If you need to install the RightFax database manually, see [Installing the RightFax Database Files Manually on page 13](#).
7. Browse to the Domino server to install RightFax components to. You can also enter this information into the text box. The default location is `\Domino\Data\RightFax`. If you do not wish to install to `\Domino\Data\RightFax`, add the following entry to the Notes section of the Notes.ini file on the fax server or e-mail gateway server:  
**RF\_Syncdatabase=Fax\RFAXSYNC.nsf.**
8. For more information about Notes.ini, contact your Notes administrator. Click **Next**.
9. On the **Configure fax rendering** document, specify one or both of the fax rendering options and associated foreign domain. Click **Next**.
10. Choose **Yes** if you have explicit permission to **Create new databases & templates and Create new replicas**. If you do not have explicit permission, but belong to a group with these permissions, choose **No** and enter the group name or browse to the group. For more information about these permissions, contact your Lotus administrator. Click **Start** to copy RightFax database files to your Domino server. When finished, click **Next**.
11. If your organization uses a full mail integration and wants to update your mail template using the Load Convert command on a Domino server, enter the required information and click **Start**. When finished, click **Next**. If your organization does not use a full mail integration, click **Skip**. For more information about

Load Convert see [Updating User Mail Files with Load Convert on page 12](#).

12. Choose **Yes** or **No** to add Workspace shortcuts to the newly installed RightFax database files. Click **Close** to finish the install.
13. Restart the Notes E-mail Gateway. Click **Done**, and close the dialog box to return to the workspace.

## Updating User Mail Files with Load Convert

Follow the steps below to incorporate RightFax design elements into user mail files using Load Convert from a Domino console. For more information about Load Convert, contact your Domino administrator.

### To update the user mail files

1. To update the mail file, log on to a Domino console.
2. Do one of the following:
  - To update the mail file for all users, type:  
**load convert mail/\*.nsf \*  
RightFax/rfaxmail.nsf**
  - To update individual user mail files, type:  
**load convert mail/<user ID>.nsf \*  
RightFax/rfaxmail.nsf**
3. Press **Enter**.
4. The process is complete when the Load Convert Utility Shutdown appears.
5. Minimize the Domino console and return to the Notes client workspace.

## Installing the RightFax Database Files Manually

Complete the following steps if you prefer or are required to install the RightFax database files manually.

**Note** You cannot upgrade or create full-mail integration templates by performing a manual installation.

### To manually install the database

1. Open a Notes client and log on with the Notes ID used to configure the e-mail gateway.
  2. On the Notes client **File** menu, click **Database** and click **Open**. Click the browse button to locate the \RightFax\Gateway folder. Double-click the file **RFINSTAL.NSF**.
  3. The About RightFax Installation Database file opens. Click the 'X' to close this window and proceed to the RightFax Installation Database.
  4. Review the comments at the Welcome screen. When finished, click **Start**. At the Step 1 window, click **Next**.
  5. Click **Manual Installation**.
  6. Specify a temporary folder to extract the database files to. This folder is relative to the local \Lotus\Notes\Data folder. When finished, click **Next**.
  7. To extract the database files, click **Start**. This process performs a Notes copy of the database files that signs and registers each file. When finished, click **Next**.
  8. Click **Close**.
- 1** Copy the files from the temporary folder you specified in step [Specify a temporary folder to extract the database files to. This folder is relative to the local \Lotus\Notes\Data folder. When finished, click Next.](#) on [page 13](#) to the Domino server. By default, the RightFax

database files are stored in the following folder: ... \Lotus\Notes\Data\RightFax\

## Creating RightFax foreign domains

You can render faxes created with RightFax in Lotus Notes using one of the following two methods:

- Incorporating only the contents of the Body field on the Notes form (that is, only the body of the Notes mail memo)
- Including the body text and the Notes form itself

When a Notes user sends a fax, the fax domain name included in the destination address implicitly defines the RightFax mail router database that process the fax and transfer it to a RightFax server for transmission. Each mail router database is limited to rendering outbound faxes from Notes in only one of the two methods listed above. The mail router database associated with the default fax domain (RFAXBODY.NSF) is configured to process only the contents of the Body field. The RightFax Mail Router (Forms) database (RFAXFORM.NSF) is used when sending faxes that include the Notes form.

### To create a foreign domain document in the Public Name and Address Book on the Domino server

1. Using Domino Administrator, open the Public Name and Address Book, and click the **Configuration** tab.
2. Expand the **Messaging** twisty, then click the **Domains** view.
3. Click **Add Domain** on the action bar.
4. In the **Foreign domain name** field, enter the name of the new domain. This name is typically **RFAX** (for sending body contents only) or **RFAXFORM** (for sending body contents and Notes form).

5. Click the **Mail Information** tab. In the **Gateway server name** field enter the distinguished name of the Notes mail server where the RightFax Lotus Notes Module is installed (e.g., Server/Org). In the **Gateway mail file name** field enter the path to the mail router database (e.g., *RightFax\RFAXBODY.NSF* or e.g., *RightFax\RFAXFORM.NSF*).
6. When finished, click **Save and Close**.
7. To complete the installation, continue to [Configuring the EFM Sync Database on page 16](#).

## Configuring the Notes E-mail Gateway to work with the Midas C++ API

The Midas C++ API by Genii Software extends the functionality of LotusScript and helps to convert and render Lotus Notes forms.

**If you have installed and licensed the Midas C++ API, follow these steps to configure RightFax.**

1. Log on to the RightFax server as an administrator
2. In Enterprise Fax Manager, stop the RightFax Email Gateway Module.
3. From a Notes client computer, log on to the EFMSync database.
4. Open the gateway document. In the Send Outbound Faxes section, change the **Notes Form Export Method** to **Notes Native Export**.
5. Save and close the gateway document.
6. Return to Enterprise Fax Manager and restart the RightFax Email Gateway Module.

## Upgrading from a Previous Integration

You can upgrade from RightFax 10.0 with a functional Notes integration and Lotus Notes R8.5, R8.5.1, R8.5.2, or 8.5.3 with any RightFax mail integration.

### To upgrade from a previous version

1. Stop the Lotus Notes Gateway service on the RightFax server.
2. Rename the current RightFax directory on the Domino server.
3. Use the installer database to install the database files for your RightFax integration (described in [Installing the RightFax Database Files by Using RFINSTALL.NSF on page 11](#)).
4. Choose the same Foreign Domain(s) used in the previous installation.
5. After the installation has completed, open both the old and new EFMSync databases and copy the following files from the old EFMSync to the new EFMSync database:
  - Settings document(s)
  - User documents
  - Server document(s)
  - Gateway document(s)
6. Start the Lotus Notes Gateway service on the RightFax server.

## Uninstalling the Notes Module

### To uninstall the Notes Module

1. On the RightFax server, open Windows Control Panel and double-click the RightFax E-mail Gateway. The **E-mail Configuration** dialog box opens.
2. Select the Notes gateway to remove, and click **Delete Gateway**.
3. When finished, click **OK**.

### To remove RightFax design elements from a user mail file

1. Open the EFM Sync database.
2. In the left pane of the EFM Sync, click **Users\By Name**.
3. In the right pane, click the name of the user whose mail file you want to modify, and click **Edit User**.
4. In the **Integrations** section of the RightFax User Options screen, deselect the boxes for the features you want to disable, and click **Save and Close**.
5. This sends the user a new RightFax user options document. Upon receipt, the user opens the message entitled RightFax User Options and click the Update RightFax button. When finished, the user closes and re-opens their mail file.
6. To mark the user or users for deletion from the EFM Sync database, select the user name or names in the list.
7. Press **delete** on the keyboard.
8. To refresh the view, press F9 on the keyboard. A

deletion confirmation appears. Click **Yes** to confirm deletion.

## Using RightFax Data Sharing with Lotus Notes

RightFax Data Sharing in a Lotus environment requires the following:

- Only one RightFax server can perform Lotus client print processing.
- Synchronizing from Notes to RightFax, when using multiple EFM Sync databases, requires each EFM Sync to be configured for data sharing.
- If synchronizing from RightFax to Notes, only one EFM Sync can synchronize.

### To configure the EFM Sync to use the RightFax shared data folders

1. Log in to the EFM Sync database using a Notes ID with **Administrative Access**.
2. On the left pane, under the Servers view, click **RightFax Servers**.
3. On the right side, click your fax server name.
4. On the action bar click **Edit RightFax Server**. The RightFax server document opens.
5. Click the twisty next to **Fax Server Directories**.
6. Edit each of the paths to reflect the RightFax shared data folders.

Repeat these steps for each EFM Sync database in your organization.

## Chapter 3: Configuring the EFM Sync Database

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When the Notes module is first installed, the RightFax database is replicated on the Domino server. This mirrored database, known as “EFM Sync,” lets Notes administrators access and modify RightFax settings from Notes. Database synchronization periodically updates the RightFax or Domino server with the data and configurations from the other.

EFM Sync contains the following information:

- RightFax server and synchronization information
- RightFax e-mail gateway information
- RightFax users and groups, billing codes, cover sheets, overlay forms, and library documents.
- Printers
- Status reports of the RightFax server and the e-mail gateway
- Logs of sent and received faxes processed on the RightFax server and more.

The interprocess communication document (ICD) is a small document that is generated when any of the module’s “on-demand” functions are activated. The ICD is delivered to the RightFax ICD Router database, where the module collects it. The module performs immediate action to fulfill the instructions contained in the ICD. For example, ICD

processing allows immediate, on demand database synchronization.

After you install the RightFax database files (described in [Installing the Lotus Notes Module on page 8](#)), you configure the EFM Sync database to meet your needs.

### Complete the following basic steps:

1. Verify that you have access to EFM Sync (described in [Understanding EFM Sync Database Security on page 17](#)).
2. Configure your integration (described in [Configuring your RightFax Integration on page 18](#)).
3. Add or configure user groups. (described in [Configuring fax user groups on page 18](#)).
4. Add users or import users from the Notes address book and configure default user settings, e.g., User Templates (described on [Adding and Configuring Users on page 18](#)).
5. Create user routing codes (described in [Creating routing codes on page 20](#)).
6. Configure the RightFax server document establishing database synchronization between the RightFax and the Domino servers (described in [Managing database replication on page 17](#)).
7. Configure the RightFax gateway document (described in [Configuring the RightFax Gateway Document on page 24](#)).
8. Configure RightFax server objects, such as cover sheets and billing codes (described in [Configuring RightFax Objects in Notes on page 30](#)).



## Understanding EFM Sync Database Security

When a user with fax administrative rights exists in EFM Sync, it overrides the Access Control Lists (ACLs). Thus, if you are going to synchronize from RightFax to Lotus Notes, update the Connections document and Default User first, and the Fax Server document. If you don't perform these tasks in this order, you can lock yourself out if the user is not an administrator on the RightFax server.

When the RightFax module is installed, you are prompted for the user or group to have administrative rights. This user/group is put in ACLs associated with all of the module's Lotus Notes databases. This group maintains Manager access over all databases. Although the group's name is defined during the installation process, qualified RightFax administrators can rename it if the need arises.

During the initial module installation, the person logged on to Notes for the installation is assigned Notes Manager access rights to EFM Sync. This person logs on to complete the installation or to assign Manager access to other users.

RightFax administrators can only make changes to the EFM Sync database.

During the module installation (described in [Installing the Lotus Notes Module](#) on [page 8](#)), a RightFax administrative group is created in the Notes Public Address Book. Any Notes users in the RightFax administrative group can grant or deny access to other users. Add or remove Notes users to this group to grant or deny access to EFM Sync. Members of this group need Notes Manager access rights to EFM Sync.

To make changes to the EFM Sync database, members of this group are also assigned administrative rights in RightFax. To

create RightFax administrators, see [Creating RightFax administrators](#) on [page 20](#).

### Managing database replication

The EFM Sync database can be configured for full or selective replication. Full replication maintains a mirrored replica of the database across two or more servers. Selective replication is used to maintain a local replica of the database, such as on a laptop.

Selective replication limits the amount of disk space required for the database, and the replication sessions can be kept short. A selective replication is smaller because it excludes log documents.

The EFM Sync database is installed with full database replication, and you can enable selective replication.

#### To enable selective database replication

1. In Notes, open **EFM Sync**.
2. On the File menu, click **Replication**, and click **New Replica**. The **Create Replica** dialog box opens.
3. Expand **Replica Settings** and click **More Settings**.
4. Click **Space Saver**, and click **Documents that meet a selection formula** box.
5. In the Formula Window, type the following formula:
6. `SELECT @IsUnavailable [Form] | @IsAvailable [Form] & Form != "Send Event" : "Receive Event" : ["Sync Event"]`
7. This formula excludes all log documents from replication. You can specify the documents you want to exclude from the replication.
8. Click **OK** to save the settings.

## Configuring your RightFax Integration

After installing the RightFax database files, configure your user integration with Notes. By default, RightFax ships with four integration profiles (called connections), each named according to the integration type it serves. Defining an integration is done on a per user basis under the Integration section of the User Options document, thus allowing multiple mail integrations in a single environment.

### To create a new connection

1. Open the EFM Sync database.
2. In the left pane of the EFM Sync, click **Connections**.
3. On the actions bar, click **New Connection**. The New Connection document opens.
4. Configure the connection document. When finished, click **Save** and **Close**.

## Configuring fax user groups

The settings in this document regulate default fax options and required fax server settings for fax user groups. These groups are normally defined on the fax server and populated with fax users by the RightFax administrator.

### To edit a User Group document

1. Click **Groups** in the left pane of the EFM Sync database window.
2. Select the group document you want to edit and click **Edit User Group** on the Notes action bar. You can create a new group by clicking **New User Group**.

For a description of the User Group settings, please refer to *Admin help* database.

## Adding and Configuring Users

During the initial setup of RightFax with your Notes system, add users to the EFM Sync database.

To access Notes, double-click the **EFM Sync** icon to open the EFM Sync database.

## Configuring User Templates

You can use the **RightFax User Options** document to configure RightFax users in the EFM Sync database.

The RightFax administrator establishes a default user template by entering data in the Default User Options document. Subsequently, each new user document is created with these values and can be customized later as needed.

When the administrator creates a user, a User Options document is placed into the user's Notes mail database, and the personal settings in the document are linked to the user's settings in the RightFax EFM Sync database. Security settings can permit the user to change some of these settings locally. When the user makes such changes, the EFM Sync database is updated automatically.

This document provides settings for the following fax features:

- Security
- Fax User identification
- Integration
- Personal Fax Preferences (including name and address book settings, fax icons, and how to convert attached files to fax format)
- Cover Sheet
- Billing Codes
- Fax Send Options

- Fax Receive Options
- Notification
- Inbound Routing
- Auto-Printing
- Pager Notifications
- Administrator Paging alerts (applies only to users with administrative permissions)
- Status

### To create a user template

1. In Notes, double-click the **EFM Sync** icon. The **EFM Sync** opens.
2. In the **User Templates** view, click the **New UserTemplate** action button. The **RightFax User Options** document opens.

For a description of the User Options settings, please refer to the *admin help* database.

## Importing users from the Names and Address Book

After installing the RightFax databases, you can import users into the EFM Sync database from the Domino Names and Address Book (NAB). After importing NAB users, you can synchronize them into the RightFax database. Supported synchronization methods are listed below:

- Maintain users in RightFax and synchronize from RightFax to EFM Sync.
- Maintain users in the EFM Sync database and synchronize from EFM Sync to RightFax.

When you import users from the NAB, RightFax automatically mails the user options document to those users. It is recommended that you import only those groups of users who have the same RightFax integration type (full mail, minimal mail, or no mail). In addition, all users configured for either a full mail or minimal mail integration open and update the user options document to enable RightFax design elements.

**Note** Users that fail to import are added to the list of imported users and are marked by a failed icon. To remove the failed icon, select users with a failed icon, and click the Clear failed icon for user(s) button located on the action bar.

### To import users from the NAB

1. In the Notes workspace, open the EFM Sync database.
2. In the pane on the left side of the database window, under the User Integration folder, click **Users\By Name**.
3. On the action bar, click the down arrow next to **Import Users from NAB** and click **Import Users**. The Select Population Options window opens.
4. Scroll down the selection box for the **Populate from NAB** selection control. Select the Domino Directory address book for your organization and click **OK**.
5. Under Other Options, click **Run silent** if you want to import users without being prompted for confirmation. This option is helpful for importing a large number of users, because you can leave the system unattended during the import process.
6. Select one of the following options:
  - **Prompt for overwrite of existing entries.** If a duplicate entry is found, you has the option to

- delete or retain the original entry.
  - **Automatically overwrite existing entries.** If a duplicate entry is found, the original entry is deleted.
  - **Do not overwrite existing entries.** If a duplicate entry is found, the original entry is retained.
7. Click **OK** to import the users. Click **Update RightFax** to finish configuring their workstations and accounts. All users **open** and **update** the Connections document to install RightFax database files on their computers.

## Creating RightFax administrators

Changes to the EFM Sync database can be made only by RightFax administrators.

During the gateway installation (described in [Installing the Lotus Notes Module on page 8](#)), you are prompted for the user or group to have administrative rights. Any Notes users in the RightFax administrative group can grant or deny access to other users. Add or remove Notes users to this group to grant or deny access to EFM Sync. Members of this group have Notes Manager access rights to EFM Sync.

To make changes to the EFM Sync database, members of this group are also assigned administrative rights in RightFax. You can assign these rights in the RightFax administration utility, Enterprise Fax Manager, or in EFM Sync. If you are synchronizing RightFax to Notes, create administrators in Enterprise Fax Manager.

### To create RightFax administrators in Notes

1. In Notes, double-click the **EFM Sync** icon. The **EFM Sync** opens.

2. Click a user view and open the user who is an RightFax administrator. Under **Security**, click **User has fax administrative rights**.
3. Save and close the user document.

## Creating routing codes

Creating new fax users in the EFM Sync database by importing them from the Notes address book does not copy or create Direct Inward Dialing (DID) or Dialed Number Identification Service (DNIS) fax routing codes for the new users. You can use the DID/DNIS building tools in the EFM Sync to generate these codes automatically.

Before you create DID or DNIS fax routing codes for your users, be sure to review the three build methods available and use the method that best suits your fax routing scheme. The following three methods are available:

- The **trimming** method converts individual users' fax numbers in the RightFax database into unique routing codes. After removing any non-numeric characters (such as hyphens, parentheses, and spaces) in the fax numbers, this method defines each user's routing code as the first or last few digits in that user's fax number. You can select whether first or last digits are used and specify a number of those digits (from two to seven) to be saved as the code. The trimming method is useful for an organization that has a range of contiguous DID numbers to use as incoming fax lines, but it requires that all users' fax numbers have the same number of digits in the same positions.
- The **extraction** method retrieves specified digits from each user's fax number according to a mask (called a formula) that the administrator defines. The formula is

formatted exactly as the users' fax numbers are, including non-numeric characters. One designated letter signifies a digit that is retrieved as part of the routing code. All other characters match a user's fax number for a code to be created for that user. The designated letter is N by default, but an administrator can change it if necessary. This method is useful where the DID or DNIS numbers are not necessarily contiguous; it does require that all fax numbers be as identical as possible in form, so that a few formulas can retrieve codes for all of the users.

- The **sequential** method generates new fax routing codes within parameters that the administrator specifies. Because it ignores the users' previously defined fax numbers completely, this method is especially useful for users who have not yet been assigned fax numbers.

#### To create DID/DNIS fax routing codes for one or more new fax users

1. In the Notes workspace, open the EFM Sync database.
2. In the pane at the left side of the database window, click **Users\By Name**.
3. In the list of fax users, click to the left of the users receiving routing codes. A check mark appears next to each user.
4. On the action bar, click the down arrow on the **Import Users from NAB ...** button and click **Create DID/DNIS for Selected Fax Users**.
5. Using the Trimming, Extraction, and Sequential tabs in the **Build DID/DNIS** dialog box, select the most appropriate build method for the routing codes in your

organization.

**Important** Verify the **Do not overwrite existing DID/DNIS entries** box is selected unless you want to replace all existing DID and DNIS routing code information on record in the database for the selected users.

6. Use the **Padding** tab to add any digits that are common to all DID or DNIS routing codes in the organization, as needed.
7. Click **OK** to exit from the Build DID/DNIS dialog.

### Refreshing users' Notes mail template

If you installed the **full** Notes Mail integration with RightFax, distribute the RightFax mail template design to all Notes mail users. Users' mail databases are refreshed with the RightFax mail template design.

#### To update the design

1. At the command prompt in the Domino server console window, type "Load Design" and press **Enter**.  
Depending on the number of Notes mail users, the process can take several minutes.
2. The process is complete when the prompt Database Designer Shutdown appears.

## Configuring the RightFax Server

When you install the RightFax database files, server information is specified in the Fax Server document in the EFM Sync database.

## Understanding database synchronization

The RightFax Lotus Notes Module synchronizes the Notes and RightFax databases. Database synchronization periodically updates either the RightFax or the Domino server with the database configuration from the other.

Synchronization is one directional: RightFax-to-Notes or Notes-to-RightFax. During synchronization, new documents and changes to existing documents are copied from the source server to the destination server, but data is never copied back from the destination server to the source server.

**Note** After synchronization is set up, modifications to RightFax database settings are made on the source database only (the database on the Domino server, by default). Changes made on the destination server is overwritten the next time synchronization occurs.

Because a large part of the database consists of logs of gateway server operations, you can control the size of the database by managing the logs. You can:

- Limit the amount of information recorded in the logs.
- Limit the number of log documents to save.
- Limit the age of log documents to save.

You also can increase the size limit of the database. To manage the log documents, refer to the topics on managing logs in the online help for RightFax administrators in Notes.

## Enabling database synchronization

When you first install the Lotus Notes Module, all database synchronization is disabled. Only Notes users with Manager access to the EFM Sync database can enable or disable synchronization.

RightFax recommends that you enable synchronization.

### To enable synchronization

1. Evaluate the database objects that you maintain in RightFax or in EFM Sync (such as users and billing codes).
2. Define the data in RightFax or in EFM Sync.
3. Determine the synchronization path for each object (from RightFax to EFM Sync, or from EFM Sync to RightFax).

### To configure the server document

1. On the Notes workspace, double-click the **EFM Sync** icon. **EFM Sync** opens.
2. Expand **Servers** and click the **RightFax Servers** view. On the right, a list of your RightFax servers appears.
3. Click a listed server, followed by **Edit RightFax Server** on the action bar.
4. Under **Basics**, the server name and version appear.

Field	Setting
<b>Synchronization</b>	Select the box to enable synchronization.
<b>Synchronization Interval</b>	Enter the frequency you want synchronization between the Domino and RightFax servers to occur. A setting of eight hours is recommended.
<b>Synchronization Logging</b>	Specify the level of information that is written to the Synchronization Log:  <b>None.</b> Records the date and time of the synchronization and the result.  <b>Terse</b> (recommended). Records the success or failure of the synchronization

Field	Setting
	<p>process.</p> <p><b>Normal.</b> Records details that make it useful to the average RightFax user.</p> <p><b>Verbose.</b> Records details that make it useful to the RightFax administrator.</p> <p><b>Debug.</b> Records all details. This option dramatically increases the size of the EFM Sync database. Select this option if you are initially testing the synchronization, if you are experiencing synchronization failures, or if you require details significant to a RightFax customer support engineer.</p> <p>For a description of the log, see <a href="#">RightFax Event Logs on page 32</a>.</p>
<b>Synchronization Prescan Agent</b>	The name of any Lotus Notes agent that runs prior to the synchronization.
<b>Synchronization Postscan Agent</b>	<p>The name of any Lotus Notes agent that run following the synchronization.</p> <p>The default is "Initialize User Notes ID from User Name." This assures that new fax users added to the EFM Sync database from RightFax are given Notes IDs in their fax user documents. The IDs are based on the User Name field in the fax user document, e.g., John Smith = JOHN_SMITH.</p>
<b>Status Monitoring</b>	Click the box to enable writing fax server status documents in the EFM Sync

Field	Setting
	database.
<b>Status Interval</b>	<p>The amount of time between the end of one status monitoring cycle and the beginning of the next.</p> <p>The status monitoring feature continually overwrites one status document. This means that you can set a short interval without risk of the database size reaching its quota. The recommended setting is 60 seconds.</p>

- Under **Fax Objects to Synchronize**, enable each RightFax object that you want to synchronize. For each object enabled, specify the synchronization method: RightFax to Notes or Notes to RightFax. Note that Pager Services is a one-way synchronization that provides the list of pager services available for Pager Notifications and Administrator Paging settings.  
To delete objects from the destination that do not exist on the source, select **Allow Deletion**.
- Under **Fax Servers to Synchronize**, specify the RightFax servers where you want to synchronize each RightFax object.
- Under **Image Files to Synchronize**, specify whether you want to synchronize the library document, cover sheet, and fax form image files **in addition** to the object IDs. This copies the library document, cover sheet, or fax form files from the RightFax server to the Domino server during synchronization. If you select either of these options, also specify a folder on the Domino server for storing files.

8. Under **Fax Server Directories**, paths and data folders on the RightFax server appear.
9. Under **Comments**, enter any comments you need as documentation.
10. Click **Save and Close** to save your synchronization settings and return to the EFM Sync database.

## Configuring the RightFax Gateway Document

The RightFax e-mail gateway for Lotus Notes monitors the RightFax mail router database for outgoing faxes and interprocessing communication documents (known as "ICD documents"). In return, the RightFax mail router monitors the Notes mail server for faxes and ICD documents.

ICD processing allows immediate, on-demand database synchronization.

### Understanding ICD processing

The interprocess communication document (ICD) is a small document that is generated when any of the gateway "on-demand" functions are activated. The ICD is delivered to the RightFax ICD Router database, where the gateway collects it. The gateway performs immediate action to fulfill the instructions contained in the ICD.

For example, the Process Outbound action in the gateway document processes outbound fax documents regularly according to the configured interval. There are times when it is crucial that the outbound faxes collected in the RightFax Mail Router database are processed quickly. Invoking the Process Outbound action composes an ICD with instructions commanding the gateway to process all outbound faxes. The ICD is delivered to the RightFax ICD Router database via

Domino mail. The gateway collects the ICD, reads the instruction, and runs the outbound processes. Finally, the gateway resets the interval clock so that outbound documents are processed next at the end of the configured interval.

Be aware that, as with all gateway processes, the ICD process has an interval between when it completes its last task and when it scans the ICD Router database for new ICD messages. For example, an on-demand action such as Process Outbound causes the sequence of events in the following example.

**Assume that the interval for ICD processing is 45 seconds and the interval for processing outbound faxes is one minute.**

1. A user selects Process Outbound from within the Gateway document in the EFM Sync database.
2. An ICD with the instruction Process: Outbound is created in the background by LotusScript.
3. The ICD is mailed to the ICD Router database.
4. When the ICD processing interval clock has counted down to 0, the gateway scans the ICD Router database.
5. The gateway finds the ICD.
6. The gateway processes the ICD by scanning the RightFax Mail Router database for outbound documents.
7. Any documents found are delivered out of Domino to the RightFax server.
8. The outbound fax processing interval is reset to one minute and counts down to 0.
9. The ICD processing interval clock is reset to 45 seconds and counts down to 0.



In this example, there is a potential lag of up to 45 seconds between the time when the Process Outbound action is invoked and the time when the ICD is read and outbound faxes are processed. For this reason, it is recommended that you configure ICD processing with a brief interval. ICDs are routed to a different database from regular fax traffic. The ICD processing task can require almost no time to complete when the ICD router is empty, so you can configure ICD processing for a shorter interval than you do for other intensive fax processes. Even a setting of 15 seconds does not tax regular fax processes because for the majority of time the ICD router database is empty.

**To configure the gateway document**

1. In Notes, double-click the **EFM Sync** icon. This opens the **EFM Sync** view. Open the **Gateway** view. A list of your RightFax e-mail gateways appears in the view.
2. Double-click a listed gateway to open the Gateway document. Click **Edit Gateway**.
3. Under **Basics**, information about the e-mail gateway is provided by the gateway.
4. Under **Interprocess Communication Document Processing**, specify the following settings:

Field	Setting
<b>Enabled</b>	Click the box to activate interprocess communication document (ICD) processing.
<b>Interval</b>	Enter the interval when the gateway monitors the ICD router database. A setting of 15 seconds is recommended.
<b>Logging</b>	Specify the level of status information that is written to the ICD router database.

Field	Setting
	<ul style="list-style-type: none"> <li>• <b>None</b>. Records the date and time the fax was submitted.</li> <li>• <b>Terse</b> (recommended). Records the success or failure of the delivery of the ICD.</li> <li>• <b>Normal</b>. Records details that make it useful to the average RightFax user.</li> <li>• <b>Verbose</b>. Records details that make it useful to the RightFax administrator.</li> <li>• <b>Debug</b>. Records all details. This option dramatically increases the size of the EFM Sync database.</li> </ul> <p>The ICD status can be monitored in the ICD router database messages view.</p>
<b>Notes Mail Server</b>	Select the Notes mail server where ICD documents are routed.
<b>Router Database</b>	Select the file name where the ICD router database is located (in the Notes Mail database.)

5. Under **Receive Inbound Faxes**, specify the following settings.

Field	Setting
<b>Enabled</b>	Click the box to receive inbound faxes.
<b>Interval</b>	Enter the interval when the gateway should check the RightFax server for inbound faxes.
<b>Logging</b>	Specify the level of information that is written to the Fax Receive Log.

Field	Setting
	<ul style="list-style-type: none"> <li>• <b>None.</b> Records the date and time the fax was received and the result.</li> <li>• <b>Terse.</b> (recommended). Records the success or failure of the received fax.</li> <li>• <b>Normal.</b> Records details that make it useful to the average RightFax user.</li> <li>• <b>Verbose.</b> Records details that make it useful to the RightFax administrator.</li> <li>• <b>Debug.</b> Records all details. This option dramatically increases the size of the EFM Sync database. Select this option if you are initially testing the synchronization, if you are experiencing synchronization failures, or if you require details significant to a RightFax customer support engineer.</li> </ul> <p>For a description of the log, see <a href="#">RightFax Event Logs on page 32</a>.</p>
<b>Notes Mail Server</b>	Select the Notes mail server where faxes should be sent.
<b>Router Database</b>	The name of Notes mail router database where the gateway sends faxes.
<b>Prescan Agent</b>	The name of any Lotus Notes agent that you want the gateway to run prior to each cycle of checking for received faxes in the mail router database.
<b>Postscan Agent</b>	The name of any Lotus Notes agent that you want the gateway to run immediately after each cycle of checking for received faxes in the mail router database.
<b>New Fax</b>	When a fax is received, this text can be

Field	Setting
<b>Subject Line</b>	<p>shown in the subject field of the Notes message that notifies the recipient. The notification message can contain a combination of text and variables.</p> <p>The default is “A new &lt;FAX_NUMPAGES&gt; page fax has arrived from &lt;FAX_CSID&gt;”.</p> <p>FAX_NUMPAGES = The number of pages received.</p> <p>FAX_CSID = The sender’s caller subscriber ID (CSID).</p>
<b>New Fax From Line</b>	<p>When a fax is received, this text can be shown in the sender field of the Notes message that notifies the recipient. The notification message can contain a combination of text and variables.</p> <p>The default is “Fax Server &lt;FAXSERVERNAME&gt;”.</p> <p>FAXSERVERNAME = The name of the fax server.</p>
<b>Include Original Subject in Completed Fax Notification</b>	The notification to the sender includes the subject line of the sent fax.
<b>Source for Fax Header Image</b>	The header of the message containing an inbound fax can include data about the receipt, such as the name of gateway and the receipt time.

Field	Setting
	The template for this data can be an .rtf file or a Notes form.
<b>Process Fax Body</b>	By default, received fax images are attached to Notes mail messages. To view the fax, the recipient selects the image and open it. You have the following options: <ul style="list-style-type: none"> <li>To attach fax images, click <b>Attach Fax Images</b>.</li> <li>To embed the image in the message so that it can be viewed within the message without opening it, click <b>Embed Fax Images</b>.</li> <li>To embed and attach fax images, click <b>Embed and Attach Fax Images</b>.</li> </ul>
<b>Fax Images to Embed</b>	<ul style="list-style-type: none"> <li>To embed the first page of the image in the mail message, such as the cover page, click <b>First Page</b>.</li> <li>To embed all the fax page images in the mail message, click <b>All Pages</b>.</li> </ul>
<b>Size of Embedded Fax Images</b>	Select the proportionate size for fax images that are embedded in Notes mail messages rather than attached.
<b>Attach History</b>	To attach a text file that contains the transmission history to each received fax, click <b>Yes</b> .

- Faxes created in Notes that captured only the contents of the Notes form body field and ignored all other elements of the Notes form (such as headers, graphics, and tables).
- Faxes created with the Notes form elements intact, capturing the **entire** underlying Notes form (instead of the body only).

Field	Setting
<b>Enabled</b>	Select the check box to send outbound faxes.
<b>Interval</b>	Enter the frequency you want the gateway to check the Notes mail server for outbound faxes. The recommended setting is 60 seconds.
<b>Logging</b>	Specify the level of information that will be written to the Fax Send Log. <ul style="list-style-type: none"> <li>None. Records the date and time the fax was sent and the result.</li> <li>Terse. (recommended). Records the success or failure of the sent fax.</li> <li>Normal. Records details that make it useful to the average RightFax user.</li> <li>Verbose. Records details that make it useful to the RightFax administrator.</li> <li>Debug. Records all details. This option dramatically increases the size of the EFM Sync database. Select this option if you are initially testing the synchronization, if you are experiencing synchronization failures, or if you require details significant to a RightFax customer</li> </ul>

6. Under **Send Outbound Faxes**, specify settings that affect outbound faxes. You can establish separate settings for:

Field	Setting
	support engineer.  For a description of the log, see <a href="#">RightFax Event Logs</a> on page 32.
<b>Notes Mail Server</b>	Select the Notes mail server where the gateway mail router database resides.
<b>Router Database</b>	The name of the Lotus Notes mail router database where the named gateway sends faxes.
<b>Prescan Agent</b>	The name of any Lotus Notes agent that you would like the gateway to run prior to each cycle of delivering faxes out of the mail router database.
<b>Postscan Agent</b>	The name of any Lotus Notes agent that you would like the gateway to run immediately after each cycle of delivering faxes out of the mail router database.
<b>Export Method</b>	<p>If faxes will consist of the contents of the Notes body field only, select <b>Microsoft Word RTF</b> as the method of export.</p> <p>If faxes will include the Notes form elements, select one of the following options:</p> <ul style="list-style-type: none"> <li>• <b>Notes Native Export.</b> RightFax converts the message to fax format using the native Notes export process. The process runs in the background and does not use the Notes client. Select this option if you are using the Midas C++ API.</li> <li>• <b>Notes Client Print Processing.</b> On</li> </ul>

Field	Setting
	the RightFax server, the Notes client print process is used to convert a message to fax format. This process is slower than the native Notes export process.
<b>Export Page Size</b>	Determines the page size for the fax. This option is not available for Notes Client Print Processing.
<b>Notes Client Print Timeout</b>	If using Notes Client Print Processing, this setting establishes a time limit for the Notes client on the RightFax server to convert the Notes message to fax format. After this time limit, RightFax will close the Notes client. It assumes that Notes is not working or is waiting for user interaction that has not been received.
<b>Notes Client Print Throttle</b>	Select the interval to run the Notes Client Print Process.
<b>Notes Client Print Cleanup</b>	<p>If using Notes Client Print Processing, this setting determines when the Notes client will be closed and opened to clean up Notes processes on the RightFax server.</p> <p><b>Important</b> Notes will stop processing printed fax forms when it is closed. Thus, in almost all circumstances, especially with high volume, set this option to Never. For the same reason, do not manually close the Notes client on the RightFax server. If the Notes client is closed, you will see the error, “Unable to open Desktop File...”</p>

Field	Setting
<b>Unknown Originator</b>	<p>Determines how to handle an outbound fax when the sender has no User Options document in the EFM Sync database:</p> <ul style="list-style-type: none"> <li>• <b>Do not send.</b> Abandons the fax and sends a failure message to the sender. Note that although the fax failure is always noted in the log, the failure message can only be sent if the user has been synchronized with the EFM Sync database.</li> <li>• <b>Send using default user.</b> Retrieves settings and data from the default user document in the EFM Sync database.</li> <li>• <b>Create user record.</b> Retrieves settings and data from the default user document in the EFM Sync database, and creates a new fax user record based on the defaults.</li> </ul>
<b>Delete Sent Faxes from Router</b>	Select the check box to have the gateway delete the fax document from the mail router database after the fax is successfully sent.
<b>Force Notification to Always</b>	Select the check box to override the sender's notification setting in the User Options document, thus always sending a notification for faxes sent through this gateway.

7. Under **Real-Time Fax Status**, you can activate real-time fax status reporting. You can establish separate settings for:

- Faxes created in Notes that captured only the contents of the Notes form body field and ignored all other elements of the Notes form (such as headers, graphics, and tables).
- Faxes created with the Notes form elements intact, capturing the **entire** underlying Notes form (instead of the body only).

Field	Setting
<b>Real-Time Fax Status</b>	Select the box to activate real-time fax status reporting.
<b>Append Cover Page to Log</b>	<p>Click <b>Yes</b> to include cover pages in the real-time fax status report. This increases the size of the report and the EFM Sync database.</p> <p>Click <b>If Needed</b> to append cover pages for:</p> <ul style="list-style-type: none"> <li>• Faxes held for preview.</li> <li>• Faxes that require approval.</li> </ul>
<b>Append Body Images to Log</b>	<p>Click <b>Yes</b> to include body pages of sent faxes in the real-time fax status report. This increases the size of the report and the EFM Sync database.</p> <p>Click <b>If Needed</b> to append cover pages for:</p> <ul style="list-style-type: none"> <li>• Faxes held for preview.</li> <li>• Faxes that require approval.</li> </ul>
<b>Append History to Log</b>	click Yes to include the history of each sent fax in the real-time fax status report. This increases the size of the report and the EFM Sync database.

Field	Setting
Delete Completed Faxes	<p>You can specify whether to delete completed faxes from the real-time fax status report after the faxes are successfully sent.</p> <ul style="list-style-type: none"> <li>Click <b>None</b> to never delete faxes from the report.</li> <li>Click <b>Successful Only</b> to delete only faxes that are successfully sent.</li> <li>Click <b>All</b> to delete all faxes from the report.</li> </ul>

- Under **Outbound Conversion Defaults**, specify document conversion defaults for Microsoft Excel, Microsoft PowerPoint, and Visio documents. The password you enter in the **Password** box is used when RightFax attempts to open a password-protected file for server-side application conversion.

## Configuring RightFax Objects in Notes

EFM Sync is a mirror of the RightFax database. If you are synchronizing RightFax to Notes, Configure the RightFax objects in the RightFax administration utility, Enterprise Fax Manager.

Because EFM Sync is a mirror of the RightFax database, each of these documents includes the same settings that appear in Enterprise Fax Manager. For a description of the settings for these objects, please refer to the appropriate section of the **RightFax Administrator's Guide**.

### To configure the objects in Notes

- Double-click the **EFM Sync** icon to open the **EFM Sync** database. Double-click each of these documents to view, add, and edit the RightFax objects in the following sequence:
  - Cover sheets
  - Fax overlay forms
  - Fax printers
  - Billing codes
  - Library documents
  - Fax user groups

## Handling Undeliverable Faxes

If you have installed the **full** Notes Mail integration with RightFax, you can configure Notes to return undeliverable faxes to the senders.

If a fax reaches the RightFax server and the server can't deliver the fax, RightFax generates a fax failure notification. If a fax sent from Notes can't be delivered to the RightFax server, the sender won't get notification of the failure. You can configure Notes to return undeliverable faxes to the senders. To do this, you activate an agent in the RightFax Mail Router database.

For each undeliverable fax, the agent creates a "Fax Delivery Failure" report. The agent mails the report to the fax sender so that the fax can be re-addressed and sent.

### To configure the "Handle Undeliverable Faxes" agent for Notes 8.x and later

- Open the **RightFax Mail Router** database.
- Click the **Code** twistie to expand the **Code** category,

click the **Agents** twistie to expand the **Agents** category.

3. Click **Handle Undeliverable Faxes**.
4. Change the value the **Runtime Trigger**) from **On Schedule Never** to **On Schedule**
5. Choose the desired interval from the list. The recommended setting is "More Than Once A Day."
6. Click **Schedule** to further define the interval. The recommended setting is 15 minutes or less. (Do not set the interval to 0 hours 0 minutes. This setting disables the agent.)

Schedule the agent so that fax senders are notified of their undeliverable faxes within a reasonable interval.

7. Save and close the agent. This re-signs the agent with your signature so that it runs within your organization.
8. In the **Agents** view, click **Handle Undeliverable Faxes** agent, and click **Enable**.

#### To configure the "Handle Undeliverable Faxes" agent for Notes 5.x and later

1. Open the **RightFax Mail Router** database.
2. In the **Agents** view, edit the agent **Handle Undeliverable Faxes**.
3. Change the value of **When should this agent run** from **On Schedule Never** to **On Schedule <xxx>**, where **<xxx>** is the desired interval when the agent runs. The recommended setting is "On Schedule More Than Once A Day."
4. Click **Schedule** to further define the interval. The recommended setting is 15 minutes or less. (Do not set

the interval to 0 hours 0 minutes. This setting disables the agent.)

Schedule the agent so that fax senders are notified of their undeliverable faxes within a reasonable interval.

5. Save and close the agent. This re-signs the agent with your signature so that it runs within your organization.
6. In the **Agents** view, click the box (right-click and select **Enable**) to the left of the **Handle Undeliverable Faxes** agent to enable it.

If this message appears: "Unable to determine the execution access privileges for this agent on <xxx>; agent may not run," you may not have the appropriate rights to execute the agent. Refer to the online help for administrators in Notes for more information on scheduled agents.

## Chapter 4: RightFax Logs and Reports in Lotus Notes

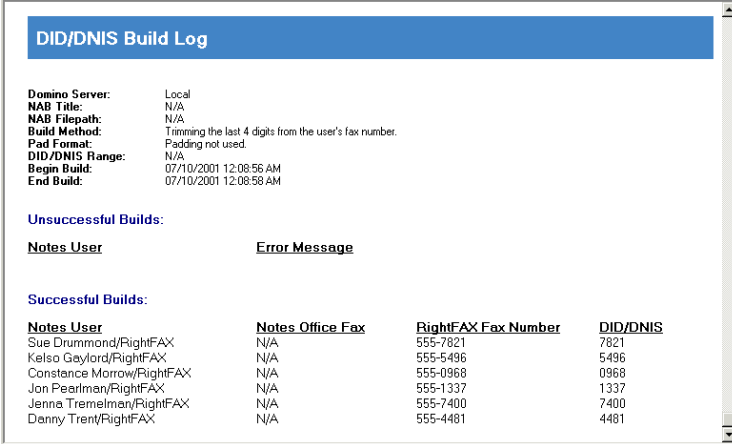
Lotus Notes generates RightFax event logs and RightFax status reports and stores them in the EFM Sync database.

### RightFax Event Logs

To open RightFax event logs in Notes, open the EFM Sync database, and open the **Logs** view. Click each log document to view the log entries.

#### DID/DNIS Build Log

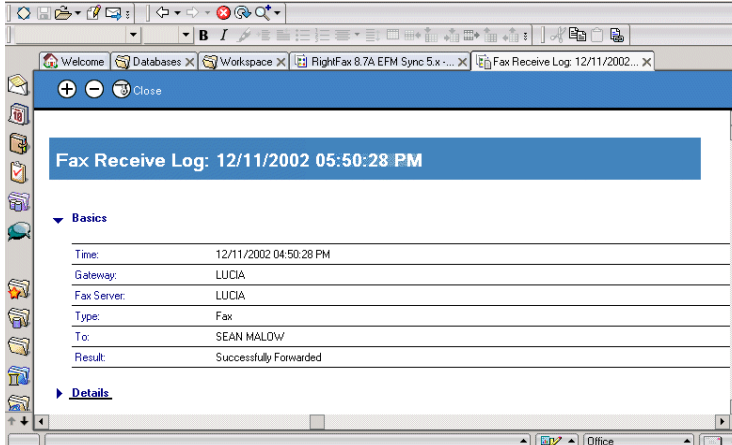
The DID/DNIS Build Log shows the results of the process used to assign DID or DNIS numbers to users. It records the build number, build starting time, build ending time, the method used to create the DID/DNIS entries, and the range of numbers that were created (for the sequential numbering method).



DID/DNIS Build Log			
Domino Server:	Local		
NAB Title:	N/A		
NAB Filepath:	N/A		
Build Method:	Trimming the last 4 digits from the user's fax number.		
Pad Format:	Padding not used.		
DID/DNIS Range:	N/A		
Begin Build:	07/10/2001 12:08:56 AM		
End Build:	07/10/2001 12:08:58 AM		
<b>Unsuccessful Builds:</b>			
<b>Notes User</b>	<b>Error Message</b>		
<b>Successful Builds:</b>			
<b>Notes User</b>	<b>Notes Office Fax</b>	<b>RightFAX Fax Number</b>	<b>DID/DNIS</b>
Sue Drummond/RightFAX	N/A	555-7921	7921
Kelso Gaylord/RightFAX	N/A	555-5496	5496
Constance Morrow/RightFAX	N/A	555-0968	0968
Jon Pearlman/RightFAX	N/A	555-1337	1337
Jenna Tremelmen/RightFAX	N/A	555-7400	7400
Denny Trent/RightFAX	N/A	555-4481	4481

### Fax Receive Log

The Fax Receive Log shows a list of all faxes routed via the RightFax gateway to Notes. It records the time each fax was received, the name and description of the gateway that delivered the fax, and the transmission result.

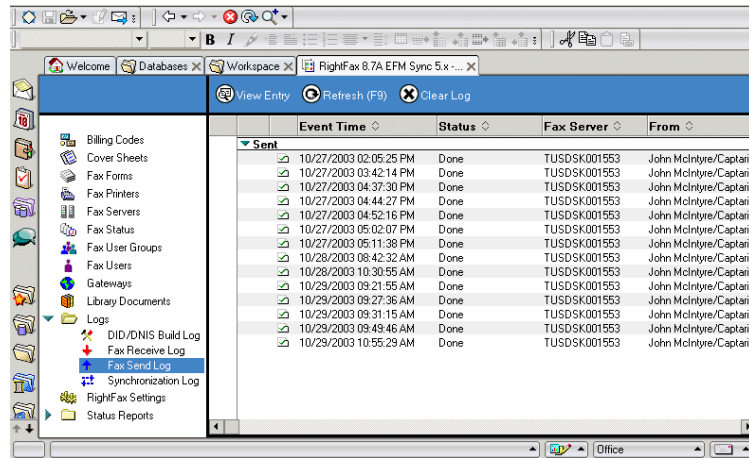


Fax Receive Log: 12/11/2002 05:50:28 PM	
<b>Basics</b>	
Time:	12/11/2002 04:50:28 PM
Gateway:	LUCIA
Fax Server:	LUCIA
Type:	Fax
To:	SEAN MALLOW
Result:	Successfully Forwarded
<b>Details</b>	



## Fax Send Log

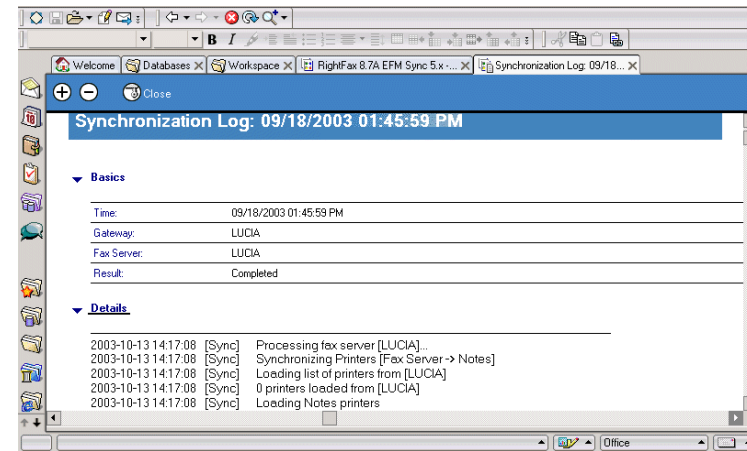
The Fax Send Log shows a list of all faxes sent to the RightFax server via the gateway. It records the time each fax was sent, the name and description of the gateway that sent the fax, and the transmission result.



## Synchronization Log

The Synchronization Log shows the synchronization events between the RightFax and Domino servers. It shows the time each synchronization event was recorded and the names of the gateway and RightFax server that were synchronized.

Double-click each synchronization log document to show details about the synchronization event. The level of detail in this log depends on the value you specify in the **Synchronization Logging** field in the Fax Server document in the EFM Sync database (see [Enabling database synchronization](#) on [page 22](#)).

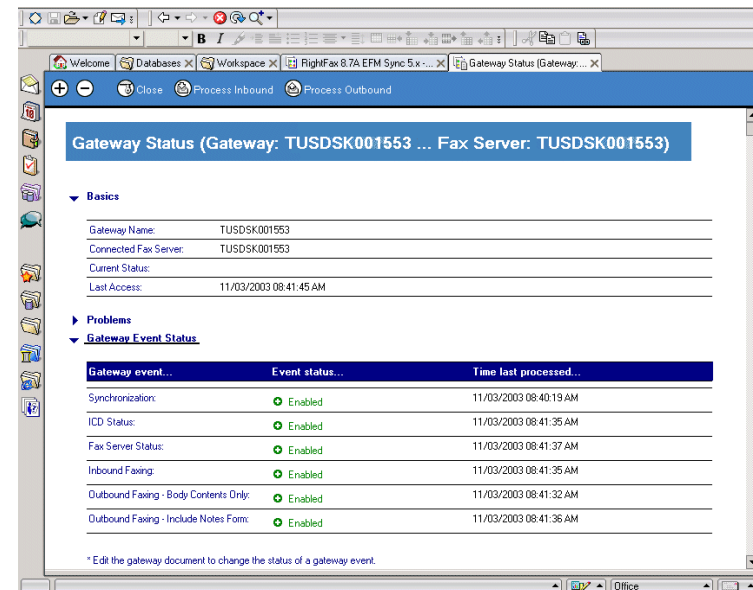
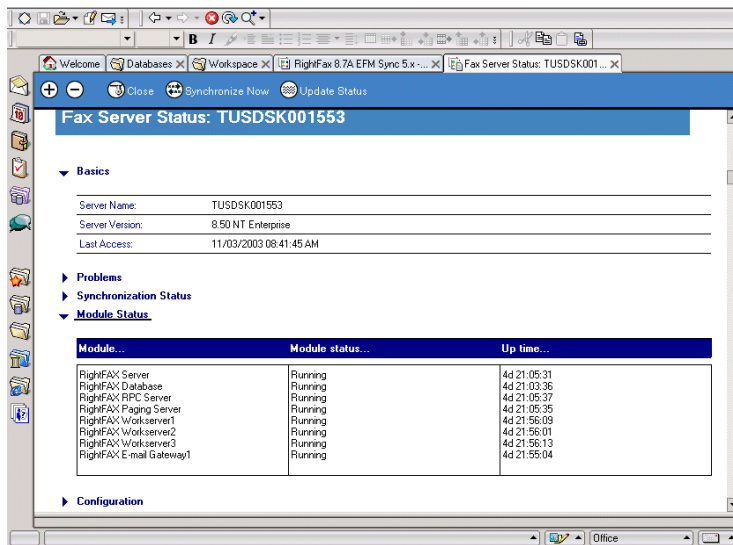


## RightFax Status Reports

To open RightFax status reports in Notes, open the EFM Sync database and open the **Status Reports** view. The list of RightFax status reports appears.

## Fax Server Status Report

When you select the Fax Server Status Report, a list of your RightFax servers appears. Double-click a server to open the Fax Server Status Report for that server. The status settings on the report cannot be edited. To change the status of synchronization events, edit the Fax Server document in the EFM Sync database.



## Gateway Status Report

When you select the Gateway Status Report, a list of your RightFax e-mail gateways appears. Double-click an e-mail gateway to open the Gateway Status Report for that server. The status settings on this report cannot be edited. To change the status of any listed event, edit the Gateway document in the EFM Sync database.

## Chapter 5: E-mail Compatible Embedded Codes

Embedded codes are special faxing instructions that you insert into fax-bound e-mail messages. You can use embedded codes to include fax cover sheet information, attach library documents, specify a time to send the fax, and more.

To add an embedded code to an e-mail message, type the code you want, along with any required parameters, between angle brackets. For example, an embedded code that tells RightFax to include the library document "Priceguide" along with the text of the e-mail is written as:

```
<LIBDOC2:PRICEGUIDE>
```

RightFax removes all embedded codes from the e-mail message when it converts it to fax form, so they don't appear in your final fax. If you type an embedded code incorrectly, it is ignored by RightFax and is included in your fax. Write embedded codes in upper or lower case. Embedded codes work consistently regardless of the e-mail applications used to create documents.

Although you can use any fonts you want in the text of your e-mail messages, embedded codes **must always** use a native printer font. This is because when the file is converted to PCL5 format, all other font types are encoded as graphic images. Only native printer fonts are stored in the PCL file in

their original text format. It is this text in the PCL file that is replaced. If you do not use native printer fonts for your embedded codes, the codes themselves appears in the instead of being replaced by the information or instruction they represent. All embedded codes are surrounded by angle brackets (< >) in the same native printer font.

**Note** For best results, consider using only the "Courier" native printer font for embedded codes.

Embedded codes can be placed anywhere in the e-mail message that you are faxing. They cannot line wrap and any embedded code statement that is so long that it wraps to a second line is ignored.

This section lists only embedded codes that are recognized by the e-mail gateways. RightFax supports several additional embedded codes when faxes are generated from native applications. For a complete list of embedded codes supported by RightFax, refer to the *RightFax Administrator's Guide*.

### ATDATE

#### Format <ATDATE: date>

Schedules the fax to send on a specific date. Dates can be expressed as relative or absolute. Relative dates give the number of days from today's date. For example, "+7" represents one week from today. Absolute dates specify the exact date to send the fax. Absolute dates must be written in one of these formats: MM/DD/YY, MM-DD-YY, or MM-DD-YYYY.

If no send time is specified with the <ATTIME> code ([ATTIME +](#) on [page 36](#)), the send time defaults to "now" (the current time of processing). For example, if a fax is sent to the queue

at 3:30 p.m. and it contains only an <ATDATE:+1> code, it is scheduled to send at 3:30 p.m. tomorrow.

Maximum field length: 10 characters

**Example** <ATDATE:9-15-99>

**Example** <ATDATE:+2>

## ATTIME

**Format** <ATTIME:*time*>

Schedules the fax to send at a specific time. The time can be relative or absolute.

Relative time is the number of hours or minutes from the current time. For example, "+2" is two hours from now. You can enter fractions of an hour in six-minute increments. Valid fractions of an hour are 0.1 through 0.9. You must enter at least one digit before and after the decimal point. For example, 1.5 and 0.3 are valid, and 1.50 and .3 are not valid.

Absolute time can be entered in 12-hour or 24-hour format. A colon separating hours and minutes is optional, and an "a" or "p" can be used to indicate A.M. or P.M. The fax server does not send the fax at exactly the minute specified. Rather, the fax becomes eligible for scheduling within 15 minutes of the specified time.

Specifying a time between the current time and midnight schedules the fax to send today. Specifying a time earlier than the current time schedules the fax tomorrow.

Maximum field length: 9 characters

**Example** <ATTIME:10:00p>

**Example** <ATTIME:+2>

## BILLINFO1 (BI1)

**Format** <BILLINFO1:*code*>

Assigns a billing code to the fax. The billing code is sent but it is not validated by RightFax.

Maximum field length: 15 characters

**Example** <BILLINFO1:4444>

## BILLINFO2 (BI2)

**Format** <BILLINFO2:*code*>

Assigns a second billing code to the fax. The billing code is sent but it is not validated by RightFax.

Maximum field length: 15 characters

**Example**

<BILLINFO2:5555>

## CHANNEL

**Format** <CHANNEL:*channel#*>

Sends the fax only on the specified channel of the fax board. This code is useful if your organization uses one channel for priority faxing, and you want the fax to go out right away. You can also use this code to limit fax broadcasts to one channel only, leaving the other channels free for priority faxing.

Although your server's first fax channel is listed as number 0 (zero) in the RightFax DocTransport module, a value of 0 in this embedded code indicates that the server uses any available channel. For this reason, any channel you specify in this embedded code must be numbered one higher than the channel as it is listed in the DocTransport (i.e., specify <CHANNEL:5> to use channel 4 as shown in the RightFax DocTransport. The DocTransport's channel 4 is actually the fifth channel because channels begin numbering at zero.)

Maximum field length: N/A

**Example** <CHANNEL:3>

## COVER

### Format <COVER>

Generates a RightFax cover sheet for the fax containing the code. If the user sending the fax containing this code is configured to automatically generate a cover sheet, only one cover sheet is generated.

Unless a cover sheet file name is specified using the <FCSFILE> embedded code ([FCSFILE +](#) on [page 37](#)), this code uses the default cover sheet file.

Maximum field length: N/A

## DELETE

### Format <DELETE>

Deletes the fax from the user's FaxUtil mailbox after it is successfully sent. This code overrides the default RightFax auto-delete setting.

Maximum field length: N/A

## DELETEALL

### Format <DELETEALL>

Deletes the fax from the user's FaxUtil mailbox after it is sent or attempted. This code overrides the default RightFax auto-delete setting.

Maximum field length: N/A

## FCSFILE

### Format <FCSFILE:*filename*>

Uses the specified file as the RightFax-generated cover sheet. The cover sheet file must exist in the RightFax\FCS folder on the RightFax server and must end with the extension .pcl. Do not specify a directory path.

Maximum field length: 12 characters

**Example** <FCSFILE:MYCOVER1.PCL>

## FINE

### Format <FINE>

Converts the body of the fax using "fine" resolution (200 × 200 DPI). This is recommended only for faxes with detailed graphics or faxes to be OCRed. This code overrides the default fax resolution set in the user's FaxUtil mailbox.

Maximum field length: N/A

## FROMFAXNUM

### Format <FROMFAXNUM:*faxnumber*>

Specifies the sender's fax number on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code is ignored.

Maximum field length: 31 characters

**Example** <FROMFAXNUM:(520)555-1234>

## FROMGENFAXNUM

### Format <FROMGENFAXNUM:*faxnumber*>

Specifies the company's general fax number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code is ignored.

**Note** The PCL Cover sheet code for this embedded code is <GENERALFAXNUM>.

Maximum field length: 31 characters

**Example** <FROMGENFAXNUM:(520)555-2345>

## FROMGENPHONE

**Format** <FROMGENPHONE:*phonenumber*>

Specifies the company's general phone number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code is ignored.

**Note** The PCL Cover sheet code for this embedded code is <OPERATORNUM>.

Maximum field length: 31 characters

**Example** <FROMGENPHONE:(520)555-3456>

## FROMPHONE

**Format** <FROMPHONE:*phonenumber*>

Specifies the sender's phone number to be placed on the RightFax-generated fax cover sheet. If no cover sheet is generated by RightFax, this code is ignored.

Maximum field length: 31 characters

**Example** <FROMPHONE:(520)555-4567>

## IGNORE

**Format** <IGNORE>

Causes all subsequent embedded codes to be ignored.

Maximum field length: N/A

## LIBDOC

**Format** <LIBDOC:*documentID*>

Sends the specified RightFax library document instead of sending the document containing the code. Multiple library documents can be specified, each as a separate LIBDOC code.

**Important** When used with email gateways, this embedded code functions exactly the same as LIBDOC2.

Maximum field length: 21 characters

**Example** <LIBDOC:INFOPACK1>

## LIBDOC2

**Format** <LIBDOC2:*documentID*>

Sends the specified RightFax library document in addition to sending the document containing the code. Multiple library documents can be specified, each as a separate LIBDOC2 code.

Maximum field length: 21 characters

**Example** <LIBDOC2:INFOPACK1>

## NOCOVER

**Format** <NOCOVER>

Turns off automatic RightFax cover sheet generation for the document containing this code.

Maximum field length: N/A

## NORMAL

**Format** <NORMAL>

Converts the body of the fax using "normal" resolution (200×100 DPI). Normal resolution faxes can be transmitted much faster than fine resolution faxes, saving time and

phone charges. This code overrides the default fax resolution set in the user's FaxUtil mailbox.

Maximum field length: N/A

## PREVIEW

### Format <PREVIEW>

Holds the fax for preview in your FaxUtil mailbox. You must view the fax in FaxUtil and select **Release** from the **File** menu before it sends.

Maximum field length: N/A

## PRIORITY

### Format <PRIORITY:priority>

Sets the priority of the outgoing fax. Allowed settings are: Low (L), Normal (N), and High (H). If a user specifies high priority and does not have the "Can use high priority" permission, the fax is sent with "normal" priority.

Maximum field length: N/A

### Example

<PRIORITY:HIGH><PRIORITY:N><PRIORITY:LOW>

## RETRYCOUNT

### Format <RETRYCOUNT:#>

Specifies the number of times the fax is retried after encountering transmission errors (such as a busy signal or human answered line). A value of 0 (zero) tells the fax server to use the system defaults.

Maximum field length: 2 numeric digits

**Example** <RETRYCOUNT:3>

## RETRYINTERVAL

### Format <RETRYINTERVAL:#>

Specifies the length of time in minutes between retry attempts when transmission errors (such as a busy signal or human answered line) are encountered.

Maximum field length: 2 numeric digits

**Example** <RETRYINTERVAL:2>

## SAVE

### Format <SAVE>

Instructs RightFax to not delete the fax image from the user's FaxUtil mailbox after being sent. This overrides any default auto-delete setting.

Maximum field length: N/A

## SMARTRESUME

### Format <SMARTRESUME>

Enables the Smart-resume feature.

Maximum field length: N/A

## Chapter 6: File Formats that Convert to Fax Format

Before conversion, RightFax checks the `whitelist.txt` file (in the `RIGHTFAX/bin` directory) to determine whether attachments are converted to fax format or not. By default, this file contains all supported file types. To prevent a file type from converting, you can either delete the file type from `whitelist.txt`, or turn it into a comment by preceding the file type with a comma in the `whitelist.txt` file. Conversions handled through PCL are always processed, regardless of the white list contents.

The following table lists the supported software applications and document file formats that can be converted to faxes by the built-in conversion engine on the RightFax server. These file types can be converted from their native format by sending as file attachments to a fax message or by using the Send To function in Windows

**Important** Conversion of PDF attachments and Postscript requires the RightFax PDF Module.

Application or file format	Supported versions	Common Extension
Ami Pro	All versions	.SAM
ANSI text (7 & 8 bit)	All versions	.TXT

Application or file format	Supported versions	Common Extension
ASCII text (7 & 8 bit)	All versions	.TXT
Bitmap	Windows versions	.BMP
Multi-page PCX	Microsoft Fax	.DCX
EPS	If TIFF image is embedded	.EPS
G3	All versions	.G3 .BG3
GIF	All versions	.GIF
HTML	Versions through 4.0	.HTM .HTML
JPEG	All versions	.JPG .JPEG .EXIF
Lotus 1-2-3	All versions	.123
Lotus Wordpro	All versions	.LWP
Microsoft Excel	Versions 2000 through 2010	.XLS .XLSX
Microsoft PowerPoint	Versions 2000 through 2010	.PPT .PPTX
Microsoft Rich Text Format	All versions	.RTF
Microsoft Visio	2000 through 2010	.VSD
Microsoft Word (see note below)	2000 through 2010	.DOC .DOCX
Microsoft WordPad	All versions	.TXT .WPC



Application or file format	Supported versions	Common Extension
Microsoft Works	Versions through 8.0	.WPS
Microsoft XML Paper specification	All versions	.XPS
MIME	All versions	.MHTML
PCX bitmap	All versions	.PCX
Portable Document Format (see note below)	All versions	.PDF
Portable Network Graphic	All versions	.PNG
Post Script	All versions	.PS .EPS
Text-based configuration files	Varies by product	.FTP .FRM .WPC
TIFF CCITT Group 3 & 4	All versions	.TIFF
Unicode Text	UNI, UTF-8, UTF-8E	.TXT
UUEncode	No specific version	.TXT
vCard	All versions	.VCF
Visio	All versions	.VSD
XML	All versions	.XML