



Fax Installation Guide

Release 2.0

9811080-002

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About This Manual

The Panagon Fax Installation Guide describes procedures for installing Panagon Fax software version 2.0 on a personal computer. This document applies to Panagon Fax release 2.0 and subsequent releases unless you are informed otherwise. This document, part number 9811080-002 supersedes the previous document with part number, 9811080-001. A PC running the Panagon Fax software components is referred to as a fax server throughout this manual.

This manual is written for installation technicians. We assume that you are familiar with DOS, Windows NT, and basic hardware installation techniques.

Release Notes

The Release Notes contain important information about Panagon Fax release 2.0 that may not be included in this document or the online Help. The Release Notes display automatically during installation through the Windows Write or Notepad application.

Related Documentation

When you install and configure Panagon Fax , refer to the documentation listed in this section.

Hardware Documentation

Refer to the manufacturer-supplied documentation for information about your PC, monitor, and peripheral components such as disk drives, controllers, network interface cards, video adapters, and fax interface cards.

Windows NT Documentation

For information about installing and configuring Windows NT, refer to the documentation provided with your Windows NT software.

Network Fax Server Documentation

Panagon Fax supports the Optus FACSys Messaging Gateway software. In addition to the following documentation, refer to the Optus FACSys documentation for installation and configuration information.

- *Fax Messaging Gateway for Microsoft Windows NT*
- *FACSys Release Notes* (displayed during FACSys Installation)

FileNET System Documentation

For information on operating and troubleshooting the fax server, refer to the following documentation:

Panagon Fax Installation Guide version 2.0

Panagon Fax User's Guide version 2.0

For information about the Outbound Fax function, refer to the following documentation.

Panagon Print Installation Guide version 4.0

Panagon Print Online Help version 4.0

Panagon Print User's Guide version 4.0

Panagon Fax Installation Guide version 2.0

Panagon Fax Online Help version 2.0

Panagon Fax User's Guide version 2.0

For information about the Inbound Fax function, refer to the following documentation.

Panagon Fax Installation Guide version 2.0

Panagon Fax Online Help version 2.0

Panagon Fax User's Guide version 2.0

For information about the WorkForce Desktop application, refer to the following documentation.

WorkForce Desktop Coordinator's Handbook

WorkForce Desktop User's Guide

For information about the Panagon IDM Desktop application, refer to the *IDM Online Help*.

FileNET Programming Documentation

For information on FileNET's WorkFlo programming language, refer to the following documentation.

WorkFlo Script Developer's Guide, Volumes I and II

WorkFlo Script Quick Reference Guide

WorkFlo/Controls for Visual Basic Reference Guide

WorkFlo/Controls for Visual Basic Programmer's Guide

New Features and Changes in This Release

Panagon Fax 2.0 is designed to replace the WorkFlo/Fax product. The goal is to enable the user to use the Panagon Fax server PC as a fully-operational fax server without additional user intervention.

Panagon Fax 2.0 contains the same features as WorkFlo/Fax 3.0.3. The major focus of Panagon Fax 2.0 includes:

- New packaging for Panagon Fax 2.0, which includes a custom In-bound Fax Visual Basic application replacement.
- Using the Panagon Capture BES (Batch Entry Services) Repository to enter faxes into the IDMIS. (WorkFlo/Fax used the WorkFlo/Scan Image Import application.)
- Synchronization of common files with the IDM Desktop 2.0 release.

The following list summarizes new features in the Panagon Fax release 2.0. For more information, refer to the corresponding section indicated after each description.

General Panagon Fax Support

New Terminology Defining 2.0 Panagon Fax

The 2.0 Panagon Fax package includes:

- Panagon Capture Fax, the Inbound Fax package, contains the following:

A custom Panagon Fax Entry Visual Basic application

The Panagon Capture Fax Component

- Fax Manager, Outbound Fax, uses Panagon Print 4.0.

For information to install and configure these packages, refer to the appropriate chapter in this Installation Guide.

New 2.0 Panagon Fax Packaging

Panagon Fax is packaged and distributed on Compact Disks. Inbound Fax and Outbound Fax is packaged as follows:

- | | |
|---------------|--|
| Inbound Fax: | Panagon Capture 2.0 Master CD
(Includes a key to install the Capture application, the Fax component, and the DocEntry component.) |
| Outbound Fax: | Panagon Print 4.0 CD
Optus Diskette Set |

Inbound Panagon Fax Support

Custom Inbound Fax Visual Basic Application Replacement

Panagon Capture Fax (Fax Entry) now functions through a custom Visual Basic application, using the Panagon Capture Fax OCX (Active X) control. The new application retains a user interface similar to the WorkFlo/ Fax product, while incorporating the power and consistency of the Panagon Capture Component technology.

For information to install and configure Panagon Inbound Fax, refer to the chapters [“Install the Panagon Capture Software” on page 203](#) and [“Configuring Panagon Fax Entry” on page 215](#) in this Installation Guide.

New System Configuration Option

This feature enables the user to check the option Display Important Messages in Popup Boxes. If checked, this option displays important messages from the Activity Trace Window. A user response is required to continue processing.

New Inbound Migration and File Migration Configuration Options

The following parameters are included on the Inbound Migration and File Migration dialog boxes and perform as follows:

Backup Directory	Allows user to select drive if Panagon Fax Entry is configured to back up files/faxes to a local or network drive.
Cache Directory	Specifies temporary storage location for Inbound faxes.

Error Directory	Indicates the directory to contain failed inbound faxes.
Batch Prefix	Specifies the prefix that Panagon Fax Entry assigns to each batch before it is processed.
Batch Folder	Selects the repository folder in which Inbound batches are created and stored.
Batch Disposition	Specifies the final state of batches created during processing with one of the following three options: Leave Batch Unindexed, Index Batch but Leave Uncommitted, or Index Batch and Commit.
DocProcessing	Executes DocProcessing before the Event Activator or after Assembly, as the user selects, if the Panagon Capture DocProcessing package was purchased.

For additional information, refer to [“Configuring Inbound Migration Parameters” on page 242](#) and [“Configuring File Migration Parameters” on page 245](#). For details, refer to the *Online Help*.

These parameters are also included on the Inbound Migration and File Migration Configuration dialog boxes and perform the following functions:

Batch Template	Indicates the Panagon template that will be used during processing. The template is created using the Panagon Capture application.
Batch Settings	Specifies the Panagon settings collection that will be used during processing. The settings collection are created using the Panagon Capture application.

For detailed information, refer to [“Configuring Inbound Migration Parameters” on page 242](#) and [“Configuring File Migration Parameters” on page 245](#). For definition information, refer to the *Online Help*.

To create templates and Settings, refer to [“Settings and Templates” on page 219](#).

New Journal Migration Configuration Options

The following parameters are included on the Journal Migration dialog box and perform as follows:

Backup Directory	Allows user to select drive if Panagon Fax Entry is configured to back up files/faxes to a local or network drive.
Batch Prefix	Specifies the prefix that Panagon Fax Entry assigns to each batch before it is processed.
Batch Folder	Selects the repository folder in which Inbound batches are created and stored.

Batch Disposition Specifies the final state of batches created during processing with one of the following three options: Leave Batch Unindexed, Index Batch but Leave Uncommitted, or Index Batch and Commit.

For additional information, refer to [“Configuring Journal Migration Parameters” on page 248](#). For details, refer to the *Online Help*.

The additional parameters are also included on the Journal Migration Configuration dialog boxes and perform the following functions:

Batch Template Indicates the Panagon template that will be used during processing. The template is created using the Panagon Capture application.

Batch Settings Specifies the Panagon settings collection that will be used during processing. The settings collection are created using the Panagon Capture application.

For detailed information, refer to [“Configuring Journal Migration Parameters” on page 248](#) . For details, refer to the *Online Help*.

To create templates and settings collection, refer to [“Settings and Templates” on page 219](#).

Outbound Panagon Fax Support

The Fax Manager Performs Outbound Functions Only

All Inbound properties, functionality, and monitoring has been removed from the Fax Manager and placed in Panagon Capture Fax (Inbound Fax) and Fax Entry programs. The Fax Manager interface and functionality is similar to the WorkFlo/Fax product.

For more information on Outbound Fax, refer to the chapters [“Installing and Configuring Panagon Print Software for Outbound Fax” on page 168](#) and [“Configuring the Panagon Fax Manager” on page 192](#).

Conventions

Throughout this manual, you will see associated brief messages designed to draw your attention to different kinds of information.

Tip Indicates hints to make your work easier.

Note Points to important information, such as situations that can affect the outcome of an operation or affect some other part of the system.

CAUTION Signals possible loss of data or time.

Screen Prompts and Messages

Text that displays on the screen looks like this in the manual:

```
Final step.  
Now transferring all other log files to a new  
tape.
```

Keyboard Commands

Commands you are to type on a keyboard appear in bold typeface, as shown in the following example.

```
cd \winnt\system
```

Education

FileNET offers introductory and advanced classes for system administrators, developers, management, and support personnel. These classes combine lecture and lab sessions to provide both conceptual understanding of the FileNET system and practice in its operation. For more information on class content and schedules, visit the Education topics in the Services and Support area of FileNET's Web site

<http://www.filenet.com>

You can also use the following phone numbers to request information and to ask questions.

local 14.966.3412

toll free 888.FNEDUC8 (888.363.3828)

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1

Overview

Panagon Fax release 2.0 consists of a number of software components that interact with each other to:

- Receive inbound FileNET faxes or files and either move them to the Panagon Capture Repository for further processing, or commit them directly to a FileNET IDMIS.
- Transmit FileNET documents retrieved from the IDMIS to an external Fax destination.
- Receive non-FileNET faxes or files.
- Create journal logs that can be committed to an IDMIS and moved to a Local or BES Repository, or backed up to a local or network drive.

You must install and configure these components separately. Therefore, installation and configuration will be easier if you understand each component's function.

Panagon Fax includes the following components:

- Network Fax Server Gateway software
- Inbound Fax: Panagon Capture Fax Component, containing the following:

A custom Panagon Fax Entry Visual Basic application

The Panagon Capture Fax Component

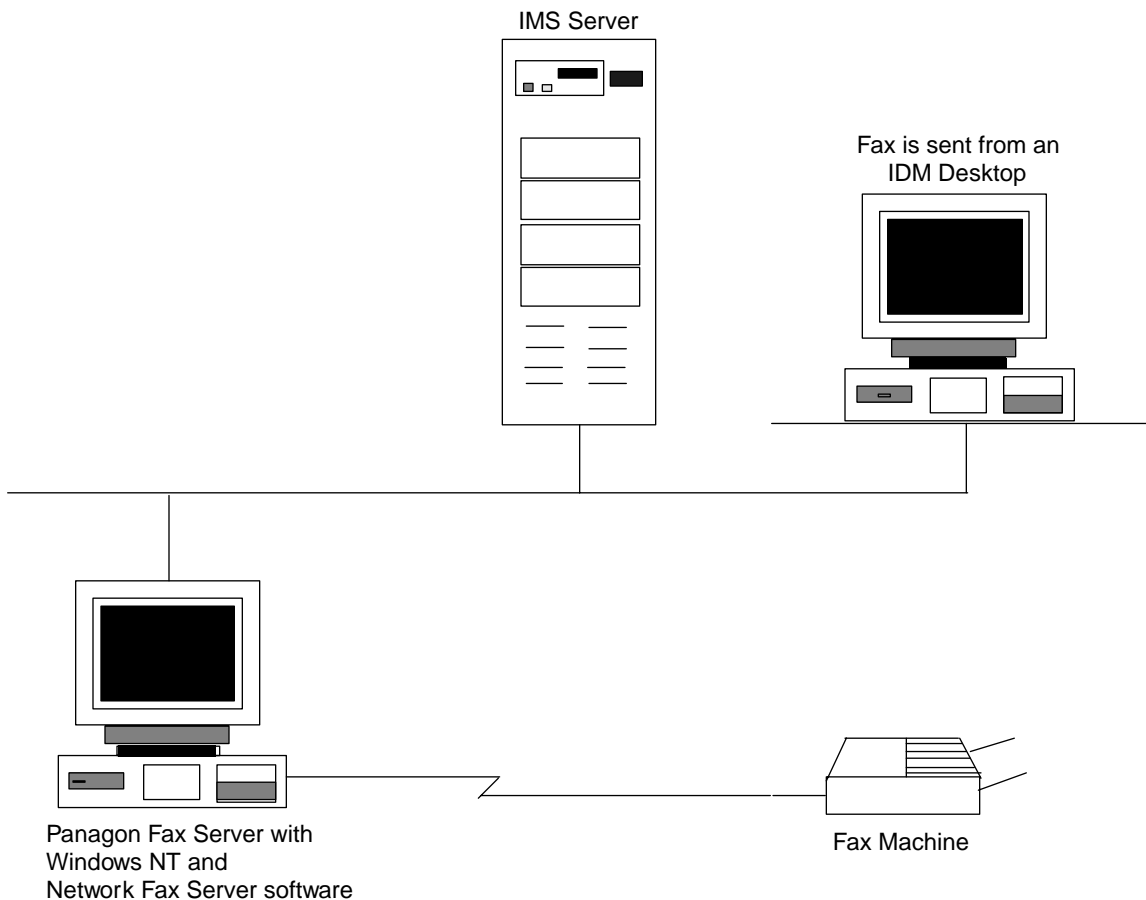
- Outbound Fax: Panagon Print 4.0 (Panagon Fax edition), containing the Fax Manager application.

The following sections describe each of these components, their role in inbound and outbound fax operations, and the process that occurs with these components in the Panagon Fax software.

Network Fax Server Software

The Network Fax Gateway Server software is third-party software product that runs on a PC under Windows NT. Release 2.0 supports only the Optus FACSys Messaging Gateway as a Network Fax Server. The Network Fax Server software receives inbound images and transmits outbound FileNET IDMIS documents to and from Group 3/4 fax machines.

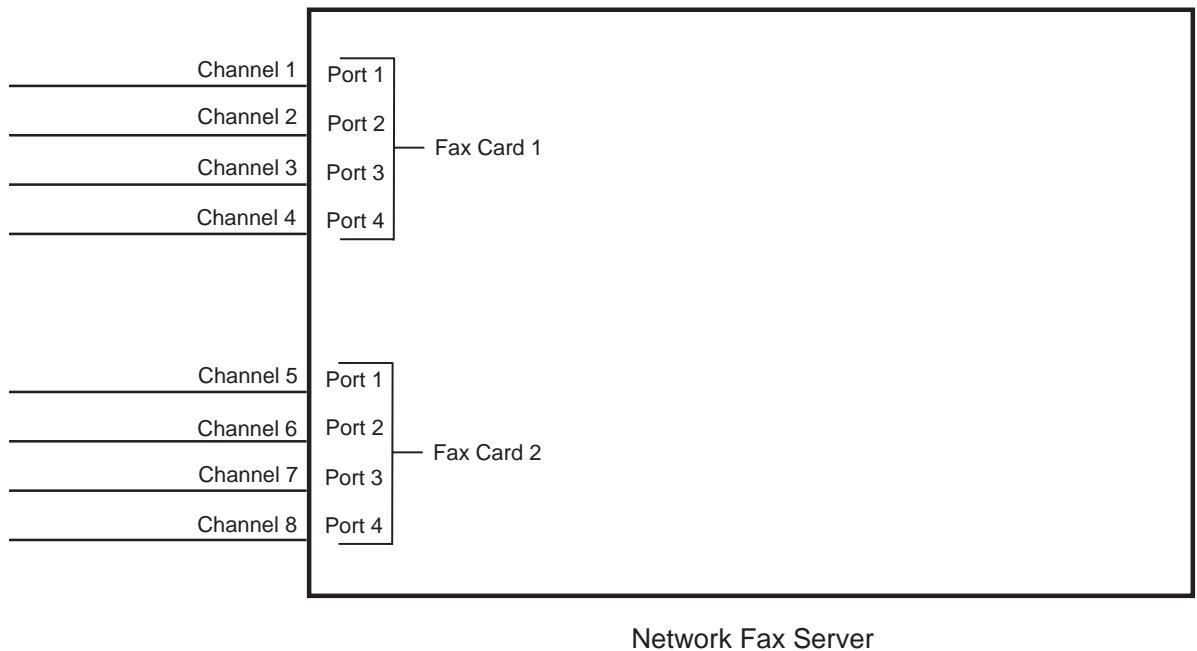
The Network Fax Server software can be used to send and receive non-FileNET fax documents, if desired. Third party client software that is available as part of the Network Fax Server package provides fax functions such as phone book management, cover page generation, and received fax viewer.



16 Fax Channels

The Network Fax Server supports up to four fax boards. Each board supports up to four fax ports, providing a total of 16 fax channels per server. Each channel can be configured for inbound traffic, outbound traffic, or bi-directional (inbound/outbound) traffic.

Twenty-four-line T1 configurations are also supported.



Inbound Routing Process

The Network Fax Server performs the following functions in the routing process:

- Examines the header of the incoming fax for routing data.
- Searches for one of the described routing elements in the order previously listed in the Routing Options table.
- Routes an incoming fax to a specific document class or uses the information for automatic indexing.

Note Fax attributes, such as DID, DTMF, ANI, CSID, Date and Time are available as Capture attributes. Capture programs use these Fax attributes to index and route faxes to document classes.

Tip You can view Fax attributes by right clicking the faxed pages within a batch in the BES Repository.

Routing Options

All inbound faxes come into one default document class. Based on the Routing Option associated with the fax, it is routed to the appropriate document class and/or the information can be used for automatic indexing. The Routing Options are outlined in the following table.

Routing Option	Description
DID	If the customer's telephone service supports Direct Inward Dial (DID), the Network Fax Server can use from 1 to 15 digits of the called phone number to assign the DID data to a specific document class and/or use the information for automatic indexing.
DTMF	If the customer's telephone service supports Dual Tone Multiple Frequency (DTMF), the fax sender can enter a configurable number of digits at the fax machine -- usually a four-digit extension. The Network Fax Server will use the DTMF data to assign the fax to a specific document class and/or can save the DTMF data for automatic indexing information.
CSID	The Network Fax Server can assign an inbound fax to a specific document class and/or use the Call Subscriber ID (CSID) for automatic indexing. The Call Subscriber ID is the fax header field from the sending fax machine.

Routing Option	Description
Caller ID (or ANI)	<p>Caller ID (ANI) functionality will be officially qualified at a later date. Until it is officially qualified, Caller ID will be classified as a configurable feature and will not be supported. Refer to the following location on FileNET's Web site for official qualification support notification:</p> <p>http://www.css.filenet.com/documentation/index.html</p> <p>Panagon Fax uses Caller ID to capture the telephone number of the sending fax machine. The sending fax number can be used as indexing information and will assign the inbound fax to the appropriate Document Class.</p>
Line (Channel) Routing	<p>You can configure the Network Fax Server software to assign all faxes coming in on a specific fax card port (such as port 3) to a specific user/document class on the IDMIS.</p>
Manual Routing by the Network Fax Server Administrator	<p>If none of the elements previously described determines the inbound fax's destination, the fax is assigned to the Network Fax Server administrator, who can forward the fax to its correct document class.</p>
Non-IDMIS Routing	<p>The FACSys Gateway can receive faxes that will not be stored on the IDMIS. Non-IDMIS users can be configured on the FACSys Gateway software. Ten users are included with each Panagon Fax license and one or more must be configured as an IDMIS destination.</p>

DID Overview

If the customer's telephone service supports DID (Direct Inward Dial), the Network Fax Server can use from 1 to 15 digits of the called phone number to route a fax to a specific document class. DID can also be used for indexing information.

DID, in general, is a method to use a special DID telephone line from the telephone company to route incoming calls to one of several telephone numbers. This single telephone line can have many telephone numbers assigned to it. When callers dial one of these telephone numbers, the DID device attached to that DID line detects which number was dialed.

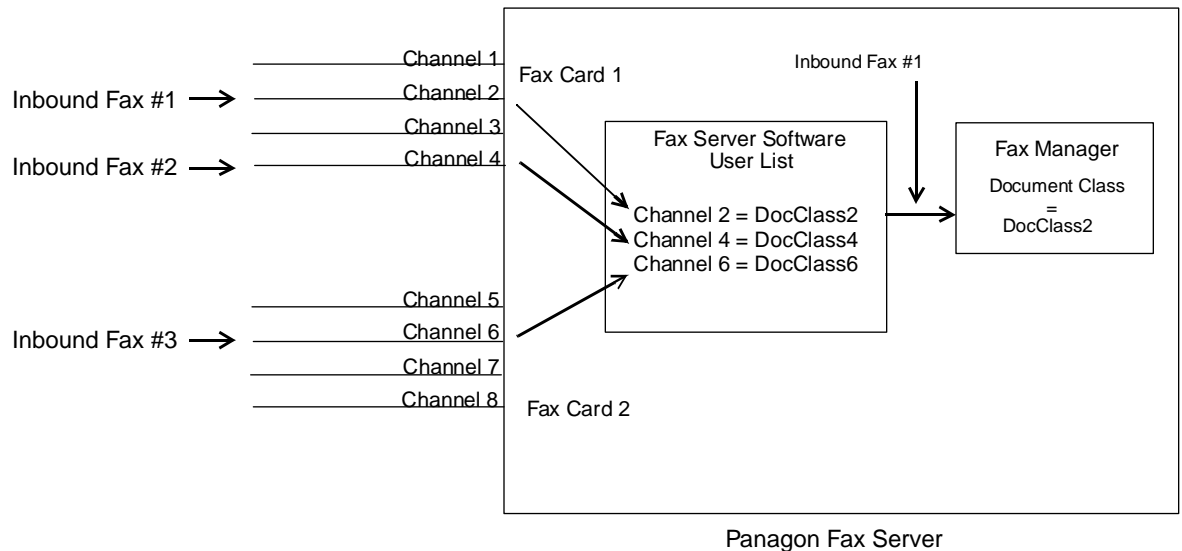
To configure DID, refer to [“Configuring DID Routing” on page 138](#).

DTMF Overview

If the customer's telephone service supports DTMF, the fax sender can enter a configurable number of digits at the fax machine -- usually a four-digit extension. The Network Fax Server will use the DTMF data to route the fax to a specific document class or can save the DTMF data for automatic indexing information.

To configure DTMF, refer to [“Configuring DTMF Routing” on page 144](#).

In the following illustration, inbound faxes are routed to a specific document class, based on the channel number of the inbound fax. For example, Inbound Fax #1 routes the fax to DocClass2 because the channel number (channel 2) in the inbound fax header maps to that document class in the Network Fax Server software.



You can choose to route faxes to a document class or use the information for automatic indexing, based on the routing options discussed previously, as long as the Network Fax Server software is configured to support the routing option.

Panagon Fax Server Software

The Panagon Fax Server software consists of the following components:

- Panagon Capture Fax, the Inbound Fax package, contains the following:

A custom Panagon Fax Entry Visual Basic application to route faxes from the Network Fax server to Panagon Capture.

The Panagon Capture Fax Component

The Panagon Document Entry Components

- Fax Manager, Outbound Fax, uses Panagon Print 4.0 (Fax edition).

You must install the Panagon Fax Server software and the Network Fax Server software (Optus FACSys) on the same computer.

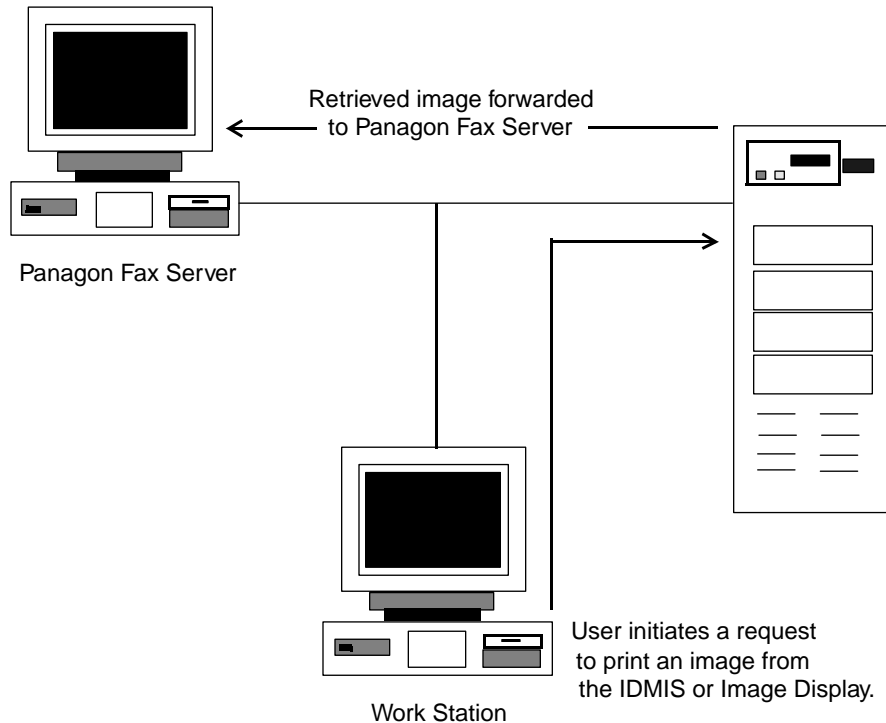
Note Do not install the Panagon Fax Server software components on a Windows NT machine on which you have installed IDMIS server software.

Each component performs a specific task for the inbound or outbound fax operations. The sections that follow describe the processing that occurs and the role of each software component for inbound and outbound fax operations.

Outbound Fax

The outbound fax operation uses Panagon Print and Fax Manager.

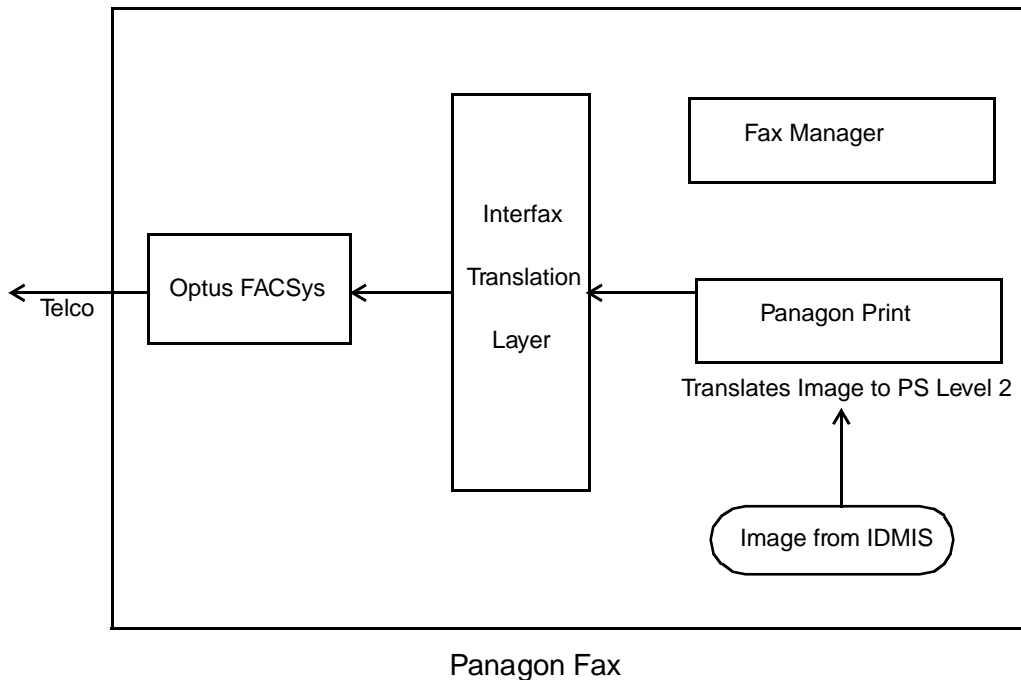
When you want to send an image to a remote destination through fax, use either the WorkForce Desktop Image Display (FileNET print option) or the Panagon IDM Desktop (FileNET print option) to submit the fax request to the IDMIS. The IDMIS server forwards the image(s) to the Panagon Fax server.



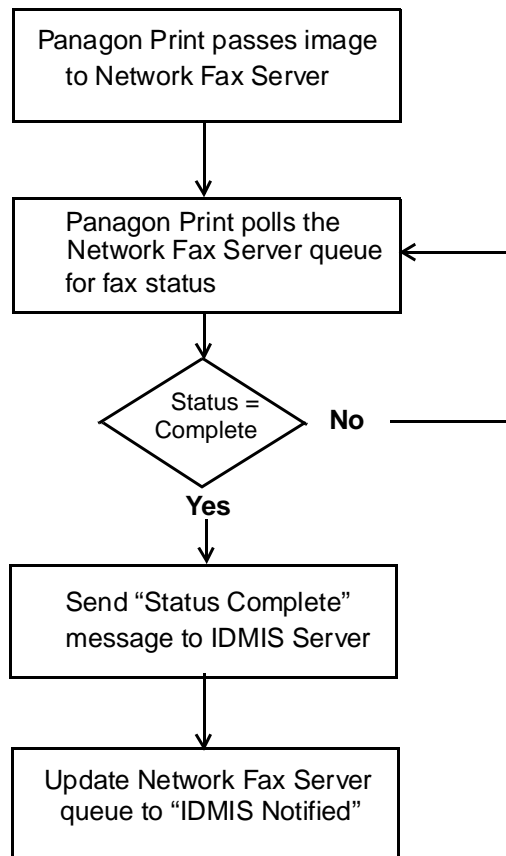
Panagon Print

The Panagon Print software on the Panagon Fax server performs the following functions in the outbound fax process:

- Accepts the print request from the IDMIS server
- Translates the images from their original FileNET format into Post-Script Level II format
- Passes them to the Network Fax server for transmission to a remote destination

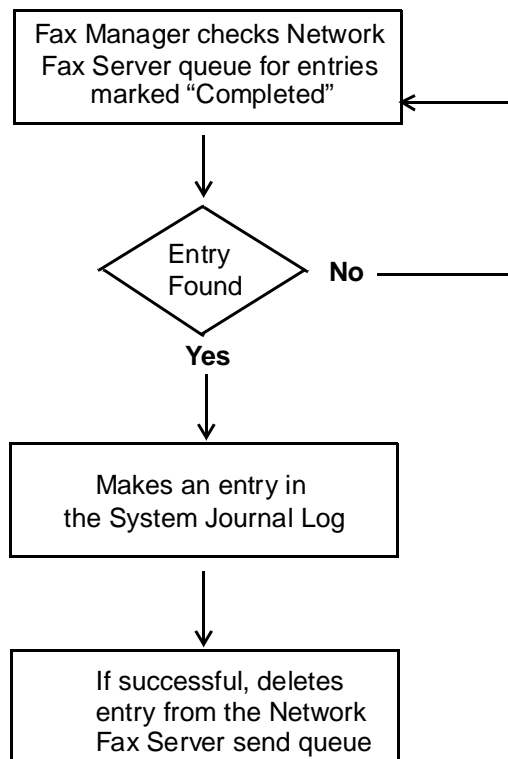


Once Panagon Print passes an image to the Network Fax Server, if the True Status feature is enabled, it polls the Network Fax Server's fax queue to check the status of the outbound fax. When the fax status in the Network Fax Server's queue changes to "Complete" (which includes both successful and failed states), Panagon Print relays this information to the IMS server from which the image originated, then updates the entry in the Network Fax Server's fax queue to "IMS Notified".



The Panagon Fax Manager works with Panagon Print to manage the Network Fax Server send queue for outbound faxes. It checks the Network Fax Server send queue for entries with a status of "Completed".

When it finds such an entry, the Fax Manager creates an entry in its own System Journal Log, then deletes the entry from the Network Fax Server send queue.



Inbound Fax

The Inbound Fax software accepts faxes from a remote location through the Optus FACSys Fax Gateway. Inbound Fax then either commits the images to the IDMIS or moves them to a Local or BES Repository if additional indexing is required. Fax batches created in the Capture BES Repository can be indexed and processed with all Panagon Capture indexing and DocProcessing components.

The Panagon Capture Fax Component checks the Network Fax Server queue at a configurable interval to see if inbound faxes destined for Capture or IDMIS have arrived.

For information on how the Network Fax Server routes inbound faxes to Panagon Fax, refer to the section [“Inbound Routing Process” on page 28.](#)

Journal Logs and Activity Trace

The Fax Manager and Fax Entry Manager both maintain journal logs. The Fax Manager can be configured to migrate its journal entry log to an ASCII text file. Configuring the Fax Manager in this manner allows users to create logs of specific activity types, such as inbound or outbound fax requests. Both the Fax Entry Manager and the Fax Manager will migrate their respective journal log files to the IDMIS for storage, if desired. Logs and files can also be backed up to disk.

The Fax Manager can show different views of the same journal file based on the filtering criteria specified by the user. For example, in one view, the user may want to see only successful entries; while in another view, the user may want to see only failed entries.

As an aid to troubleshooting, activate an optional activity trace function within the Fax Manager and the Fax Entry Manager. Activity trace files can be migrated to the IDMIS through the Fax Entry Manager or backed up to disk for later review and analysis.

System Requirements

This section describes the hardware and software requirements for a Fax Server running Panagon Fax release 2.0 software.

PC Platform Requirements

Minimum requirements to support two 4-line fax cards include:

- Pentium 133 MHz PC or greater
- 32 MB of RAM, with 64 MB or greater recommended

Note

FileNET recommends a minimum of 64 MB of RAM.

- 2 GB hard disk or larger
- VGA monitor and adapter set to 800 x 600 graphics resolution
- 3.5-inch, high-density disk drive
- CD-ROM drive
- Keyboard and mouse

We strongly recommend that you select only hardware that appears in the Microsoft Windows NT Hardware Compatibility List.

Combining Panagon Print and Panagon Fax Functionality

FileNET supports running Panagon Print and Panagon Fax on the same Windows NT-based PC platform to form a combined print/fax server. However, we recommend this configuration be used only in application environments that have ad hoc or low-volume print and outbound fax requirements.

An application that requires support for high-volume printing, a large number of distributed printers, or high-volume outbound fax should separate the Panagon Print and Panagon Fax services onto independent machines. Note that high-volume outbound fax is an especially CPU-intensive operation requiring a dedicated high-performance machine.

Use the NT Performance Monitor utility to measure CPU utilization and network traffic relative to your Panagon Print and Panagon Fax applications. If your CPU utilization is consistently at or near 100%, we recommend that you install Panagon Print and Panagon Fax on their own server platforms.

Network Interface Card

You must install a Windows NT-compatible Ethernet or Token Ring network adapter and the cabling appropriate to your topology.

Fax Card

You must install at least one of the fax cards specified in the Optus FACSys Fax Messaging Gateway v 4.01 manual. The GammaLink cards are productized; all others are configurable, which affects the level of support available through FileNET. For more information on productized and configurable hardware, refer to the FileNET Peripheral Support Policy.

The number of fax cards you can install depends upon the resources of your fax server PC. If most of your fax activity is outbound and requires many conversions, two 4-port fax cards may be the most your server can use effectively.

Inbound faxes do not tax the CPU. Even with heavy inbound fax activity, the fax server can effectively use up to four four-line fax cards.

Panagon Fax supports a maximum of 16 fax lines, or 24 with the qualified T1 configuration. The number of lines supported per fax card varies by card manufacturer. For details, refer to your manufacturer-supplied documentation.

DID Functionality

DID requires a special DID trunk line, which you can order from the telephone company. When ordering the trunk line, you must specify the number of telephone numbers to configure on the line. Twenty telephone numbers per line is the maximum.

DID requires special fax boards that accommodate the DID telephone lines. Panagon Fax 2.0 has been qualified with the GammaLink CPD fax board and also the CPD 220 fax board.

- The CPD fax board can handle a single DID trunk line. Be aware that the CPD board and DID lines in general can only handle inbound traffic. Outbound faxes require an additional fax board that has standard analog lines that can accommodate standard inbound and outbound fax transmissions.
- The CPD 220 fax board has two DID lines for DID inbound faxing only and two standard lines for non-DID inbound or outbound faxing.

A single DID trunk can handle only one call at a time, even though multiple fax numbers are configured for each DID trunk.

FileNET has qualified a dual-board configuration for customers who require both DID inbound transmissions and non-DID outbound fax transmissions on the same Panagon Fax server. This configuration is indicated below.

FileNET-Qualified Fax Board Configurations for DID

- One GammaLink CPD board for DID inbound fax transmissions
- One GammaLink CP4/LSI analog fax board (on the same Panagon Fax server)

The GammaLink CPD board allows for a single inbound fax transmission at a time, but the DID line can handle many telephone numbers on that single line. For higher volume applications, multiple CPD boards may be required to handle the inbound calls.

The GammaLink CP4/LSI board is qualified with the GammaLink CPD in the same Panagon Fax server. This combination offers a single DID line (CPD board) for inbound faxing along with four additional analog lines (CP4/LSI board) for outbound faxing (the four analog lines could be used for inbound as well).

DTMF Functionality

DTMF does not require special hardware nor multiple telephone numbers from the telephone company. As long as the telephone lines are capable of handling tone dialing, the lines are compatible for DTMF.

FileNET-Qualified Fax Board Configurations for DTMF

- One GammaLink CPD board for DTMF
- One GammaLink CP4/LSI analog fax board (on the same Panagon Fax server) or multiple GammaLink CP4/LSIs (on the same Panagon Fax server)

Panagon FAX Server Software Requirements

- Windows NT 4.0 or later (either Workstation or Server). The minimum requirement is Service Pack 3.
- Optus FACSys 4.10 server software with PostScript Level II support (plus Optus-issued service packs). The minimum requirement is Optus service pack 4.

Note Do not install service packs more recent than our minimum requirement unless specifically recommended by FileNET.

- Panagon Fax software includes the following components:

Inbound: Panagon Capture Fax (Fax Entry)

Outbound: Fax Manager

Panagon Print 4.0

FileNET System Compatibility

A Fax Server running Panagon Fax 2.0 is compatible with IDMIS 3.4.1 or later.

Note You must obtain a new SLAC key to add a new Fax Server to an existing IDMIS configuration. For more information, refer to the *SLAC Handbook*.

Transport Protocol

Panagon Fax uses TCP/IP to communicate with the IDMIS server. If desired, you can use Telnet and the Windows NT FTP Server Service to enable remote access by FileNET technical support staff. For more information, refer to the section [“Remote Support” on page 58](#).

Installation/Configuration Worksheets

When you install Panagon Fax, you must provide specific information about your network, the FileNET system, and the fax server. Complete the following Installation Worksheets before starting the installation process, so you have this information at hand.

General Network Information

Parameter	Your Site
Medium	<input type="checkbox"/> Ethernet <input type="checkbox"/> Token Ring
Network Adapter Brand and Model	
Token Ring Transmission Rate	<input type="checkbox"/> 4 Mbps <input type="checkbox"/> 16 Mbps
Ethernet Encapsulation Type	<input type="checkbox"/> Ethernet II 8137 <input type="checkbox"/> Ethernet IEEE 802.3 without 802.2 (LLC) <input type="checkbox"/> Ethernet Raw 802.3 without 802.2 (LLC)
Network Operating System	<input type="checkbox"/> NetWare <input type="checkbox"/> LAN Manager <input type="checkbox"/> Other (specify):
Transport Protocol	<input type="checkbox"/> TCP/IP (required)

Parameter	Your Site
Network Bridge or Router	<input type="checkbox"/> None <input type="checkbox"/> IBM 8209 <input type="checkbox"/> Novell Router <input type="checkbox"/> CISCO Router <input type="checkbox"/> CrossComm Bridge <input type="checkbox"/> Other (specify)
Routing Method	<input type="checkbox"/> Novell Routing <input type="checkbox"/> Source Routing <input type="checkbox"/> None

TCP/IP Information

Parameter	Your Site
TCP/IP Type	<input type="checkbox"/> LAN Workplace for DOS (Novell protocol) <input type="checkbox"/> WINSOCK (Windows Socket API protocol)
Fax Server IP Address	
Fax Server Default Gateway IP Address	
IDMIS Server IP Address	
Subnet Mask	

IDMIS Server Information

For more information on the definition of IDMIS server parameters, refer to your *System Administrator's Handbook*.

Parameter	Your Site
IDMIS Server Domain Name	
IDMIS Server Organization Name	
User Name and Password (to log on to IDMIS from the fax server)	
Fax Queue Name and Print Server Number	

Windows NT Information

Parameter	Your Site
File Format	<input type="checkbox"/> FAT <input type="checkbox"/> NTFS
Computer Name	
Windows NT User Name and Password for system administrator (Needs to be part of Administrator group)	

Fax Server Information

Parameter	Your Site
Number of Fax Lines (channels)	
Fax Card Brand and Model Number	
Board Settings	
FACSys User Name and Password (for Panagon Fax user)	

Inbound Fax Routing Information

Enter values for the routing method(s) you intend to use to route inbound FileNET faxes to the Panagon Fax user.

For example, if you intend to route faxes based on the CSID of the incoming call, locate the Remote CSI Lookup row in the following table, and enter the CSID for your site that will be used by the Network Fax Server to map to the Panagon Fax user.

Parameter	Your Site
DID (Direct Inward Dial)	
DTMF (Dual Tone Multiple Frequency)	
Remote CSI Lookup	
Caller ID	
Line (channel) Routing	

Installation/Configuration Check List

The following check list summarizes the major steps involved in installing Panagon Fax.

- Set up the PC (integrate the hardware)
- Install Windows NT
 - Install Windows NT networking components
- Configure the IDMIS
- Install Network Fax Server Software (Optus FACSys)
 - Install FACSys software
 - Install Optus-released service packs (if any are available)
 - Install client license software
 - Create Windows NT user account for FACSys Server service
 - Define FACSys user name and password
 - Configure inbound fax routing options
 - Install FACSys Client software

- Install Panagon Capture with Panagon Capture Fax (Inbound)
 - Create/modify the cover page COVER.TIF file
 - Create the Folders needed for Panagon Capture Fax (Inbound).
 - Create the settings collections and templates required for Panagon Capture Fax.
- Install Panagon Print 4.0 (Fax Manager, Outbound)
- Configure the Fax Manager (Outbound)
- Configure the Panagon Fax Entry Manager.
- Test the settings collections and templates and Fax Server operation in Panagon Ad_Hock mode before using.

2

System Setup

This chapter describes the following topics:

- Setting Up the PC Platform
- Installing Fax Devices
- Installing Windows NT
- Installing Windows NT Networking Components

Throughout this chapter, you are asked to test newly installed components. Do not proceed to the next section until you verify that the components you just installed are working correctly.

Setting Up the PC Platform

Verify that the Fax Server PC meets the minimum hardware requirements listed in the section [“System Requirements” on page 40](#).

If your system is not already integrated by the manufacturer or vendor, install all PC hardware and configure the system according to the manufacturer’s instructions.

Installing Fax Devices

The fax devices that the Fax Server supports are listed in the *Optus FACSys Fax Messaging Gateway* manual. The GammaLink boards are productized; all other boards are configurable.

Install the devices in the PC according to the manufacturer's hardware installation instructions. Ensure that each device uses unique hardware settings to avoid conflicts.

Do not install the manufacturer's driver software. Drivers are installed as part of the FACSys installation.

Installing Windows NT

The fax server runs Windows NT 4.0 with Service Pack #3, or later. For detailed installation and configuration instructions, refer to your Microsoft Windows NT documentation.

Express Setup

We recommend you use the Express Setup option. Express Setup identifies your computer's hardware and software, then automatically installs Windows NT components.

Fax Server-Related Configuration Requirements

Most of the selections you will make when installing Windows NT will be specific to your site. There are some selections you must make to accommodate the fax server's requirements. There are also some optional selections you may want to make. Before you start the installation, review this entire section to ensure that you make appropriate choices.

File Format

When you install Windows NT, you must choose a file format. Choose between NTFS and FAT formats.

- If the PC will be a dedicated Fax/Print server, we recommend the NTFS file format.
- If you want to boot the PC to both Windows NT and DOS, and want DOS to share the same partition as Windows NT, we recommend the FAT file format.

Computername

When entering a name for the fax server during Windows NT installation, be certain that the name you use is unique on the network and is not used by any other element (including printers).

Note The Windows NT computername is used throughout the installation and configuration process. Write this name on a sheet of paper for future reference.

Network Adapter Driver

Windows NT provides drivers for several network adapters. A list of supplied drivers displays in the Network Adapter Setup dialog box.

If Windows NT does not supply a driver for your network adapter, check whether the adapter manufacturer supplied an NDIS 3.0 driver with the card. If necessary, contact the adapter manufacturer for a driver.

Increase Virtual Memory Size

Windows NT uses virtual memory. When you install Windows NT, the virtual memory pagefile size is set to the total amount of RAM in your system plus 11 MB, or the amount of available disk space, whichever is less. This default value may not be adequate for Panagon Fax to handle high-volume fax activity.

To ensure that the fax server has adequate resources and to boost throughput, you may want to increase the initial virtual memory paging file size to 150 MB. Use the Control Panel System option to increase the initial virtual memory paging file size to 150 MB or larger. For information on the Control Panel System option, refer to your Windows NT documentation.

Fax Server-Related Configuration Options

You may want to install the following options.

Remote Support

FileNET support staff can remotely access the fax server for support purposes if you install pcANYWHERE32. You must also install the Telnet and File Transfer Protocol (FTP) Server services on the fax server, and you must equip the fax server with an internal or external modem.

The Telnet service is installed automatically when you install TCP/IP, but FTP must be manually installed. For details on TCP/IP installation, refer to the section [“Installing TCP/IP” on page 61](#).

Before you decide to make the fax server accessible for remote support, consider the following resource and security issues associated with the FTP Server service:

- Running the FTP Server service consumes approximately 400 KB or more of physical memory and up to 11 MB of virtual memory.
- FTP passes unencrypted user passwords over the network. A user with physical access to the network may be able to view these passwords during FTP validation.

For details on installing pcANYWHERE32, refer to [“Appendix C - Installing pcANYWHERE32” on page 270](#).

Configuring Windows NT for Automatic Logon

Normally, when the fax server boots, you log on to Windows NT manually. After you log on, the Program Manager starts, followed by all the programs whose icons reside in the Program Manager's Startup group.

If you want the fax server to automatically load the programs in the Startup group without a manual logon, you can configure Windows NT for automatic logon. However, the following system security issues are associated with automatic logon:

- To enable automatic logon, you designate a user already defined in Windows NT as the DefaultUser. You specify the DefaultUser and the user's password (DefaultPassword) in the Windows NT Registry database. The password is not encrypted, so users who are familiar with the Registry database can view it.

Because anyone who boots the fax server is logged on automatically as the DefaultUser, the DefaultUser's ability to access certain programs and files should be restricted. For example, the DefaultUser should not be able to run the Windows NT User Manager or Registry Editor programs.

- To enable automatic logon, you must edit the Registry database. For details, refer to [“Appendix B- Editing the Registry Database” on page 260.](#)

Testing the Installation

When the Windows NT installation is complete, the computer restarts. After the computer reboots, you may be prompted to choose an operating system to load. If you do not select an operating system from the displayed list, or if there is no list, Windows NT loads by default. If the installation is successful, a Welcome screen displays. If the installation is not successful, consult your Windows NT documentation.

From the Welcome screen, you can log on to the fax server as an Administrator. For details, refer to your Windows NT documentation.

Installing Windows NT Networking Components

Panagon Fax uses TCP/IP as its transport protocol. Although you can install TCP/IP when you initially install Windows NT, we recommend you install it after the NT installation is complete and tested.

To permit FileNET support staff to access your fax server remotely, install the FTP Server service when you install TCP/IP.

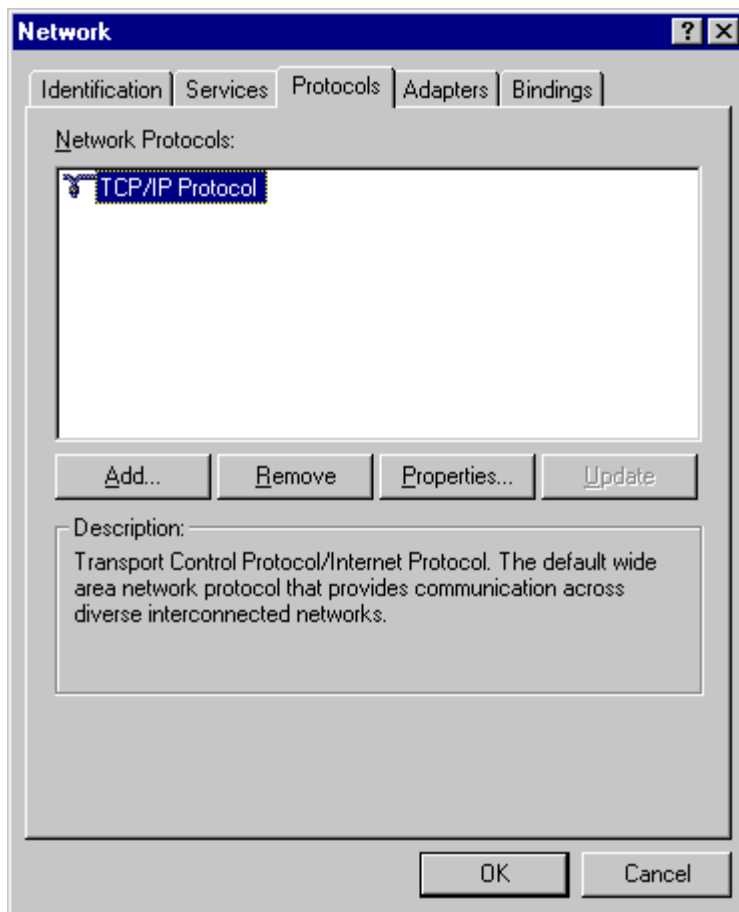
To connect to a NetWare file server from the fax server, you must also install the Microsoft Client Service for NetWare (CSNW) and NWLink protocol.

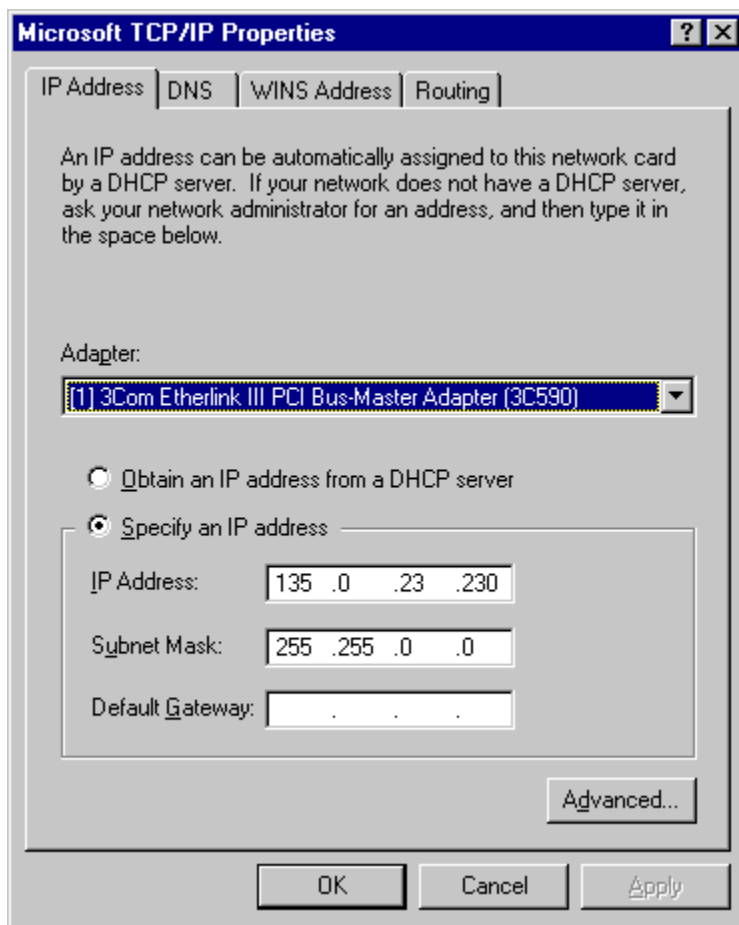
Basic guidelines for installing both TCP/IP and CSNW are discussed in the following sections. For detailed instructions, refer to your Windows NT documentation.

Installing TCP/IP

To install TCP/IP, you must log on to the fax server as an Administrator.

You will use the Network option in the Windows NT Control Panel to install and configure TCP/IP. For details, refer to your Windows NT documentation or online help.





When configuring TCP/IP using this IP Address tab, observe the following guidelines:

- Do not enable the “Obtain an IP address from a DHCP server” option.

- If there is a router between the IDMIS server and the fax server, locate the IP Address field, and enter the router's IP address as the default gateway address.
- In most cases, you can accept the subnet mask default value. For information about specific cases, contact your network administrator.
- Leave the Default Gateway field at its default value if there are no routers.

If your system uses a domain name server (a server that keeps track of host names and addresses for other computers on the network), select the DNS tab and enter the appropriate information for your domain name server. For more information, refer to the Windows NT online help.

To permit FileNET Support staff to access your fax server remotely, you must install the FTP Server service when you install TCP/IP. To install the FTP Server service, check the FTP Server Service checkbox in the TCP/IP Installation Options dialog box. For details, refer to your Windows NT documentation.

After installing TCP/IP, restart the fax server. Choose the Restart Now option from the Network Settings change dialog box that displays. Once the fax server restarts, log on as Administrator.

Test the Connection to the IDMIS Server

Use the Packet Internet Groper (Ping) utility to verify that you can contact the IDMIS server.

Use the DOS Command Prompt option in the Main program group to open a DOS shell window. At the command prompt, enter the IP address of the IDMIS server using the following format:

ping <IP address of IDMIS server>

For example: ping 135.1.2.10

If TCP/IP is running, the physical connection between the IDMIS server and the fax server is working correctly, and the IP address information is entered correctly, output similar to the following displays:

```
Reply from 135.0.2.10: bytes=32 time=10MS TTL=225
Reply from 135.0.2.10: bytes=32 time=10MS TTL=225
Reply from 135.0.2.10: bytes=32 time=10MS TTL=225
Reply from 135.0.2.10: bytes=32 time=10MS TTL=225
```


Setting Up Access to a Novell NetWare Server

If you want the fax server to access a Novell NetWare fileserver, you must have the following software:

- NWLink IPX/SPX Compatible Transport
- Client Service for NetWare

In a default Windows NT installation, NWLink IPX/SPX Compatible Transport is installed for you. If it does not display in the Installed Network Software list in the Control Panel Network Settings dialog box, you must install and configure the NWLink IPX/SPX Compatible Transport software. You must also install and configure the Client Service for NetWare software through the Network option in the Windows NT Control Panel. For details, refer to your Windows NT documentation.

After installing Client Services for NetWare, you must restart the fax server. Once the fax server restarts, select your preferred NetWare server as described in the Windows NT documentation, then log on as Administrator.

If you do not see a list of NetWare servers, this situation may have been caused by the following:

- You may have configured Client Service for NetWare incorrectly.
- The NetWare server might be down.
- There may be a network media-related problem.

To resolve these problems, refer to your Windows NT documentation or contact your network administrator.

Configuring the IDMIS Software

The Image Management Software (IDMIS) software cannot send jobs to a fax server unless both a print queue and a fax queue are configured and mapped. Before installing and configuring Panagon Fax Server's software components, you must configure and map the following:

- Configure a print queue and a fax queue in the IDMIS on the FileNET server.
- Map the IDMIS print queue to the Panagon Print server process in the Panagon Fax Server.
- Map the IDMIS fax queue to the fax server process in the Panagon Fax Server via the Panagon Fax Server's TCP/IP address.

This chapter describes how to configure the print and fax queues on an existing IDMIS configuration. For general information on installing and configuring the IDMIS software, refer to the *System Administrators Guide* for your IDMIS platform.

Note

You must obtain a new SLAC key to add a new fax server to an existing IDMIS configuration. For more information, refer to the *SLAC Handbook*.

Note If you do not have any print queues configured for Panagon Print Servers on your network, there may be some additional steps you must take that are indicated in the Release Notes. To access the Release Notes, refer to the section [“Release Notes” on page 10](#).

For all IDMIS releases, your IDMIS server is configured as either a combined server (i.e., all IDMIS services reside on the same computer) or as distributed servers (i.e., the IDMIS services are spread among two or more computers). When necessary, this chapter provides separate instructions for each of the available IDMIS configurations.

Configuring IDMIS Software Release 3.3 or Later

Perform the following procedures to configure an IDMIS server release 3.4.x to recognize your fax server. You must have the following information for each fax queue before performing the procedures in this section:

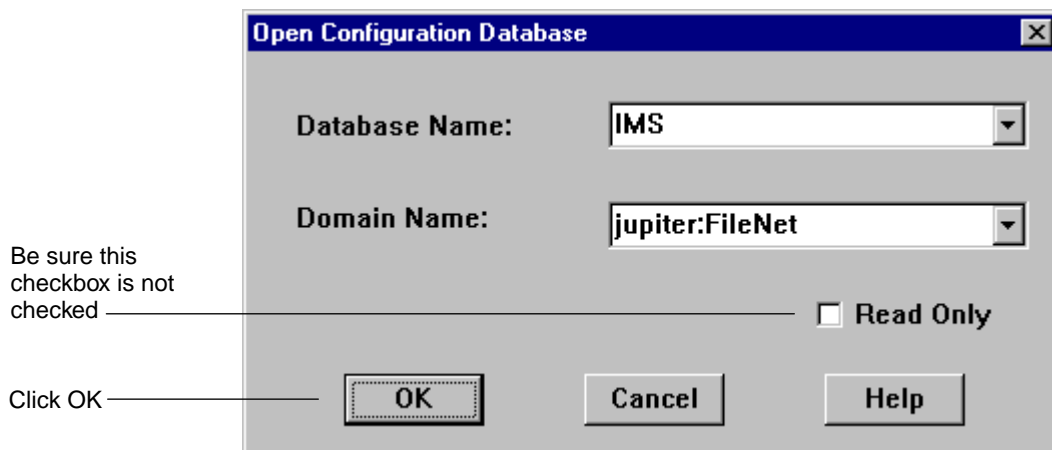
- TCP/IP address of the fax server
- Fax queue name

We recommend using the same name to identify both the fax server and its corresponding IDMIS queue.

To configure a fax queue on the IDMIS server, perform the following steps.

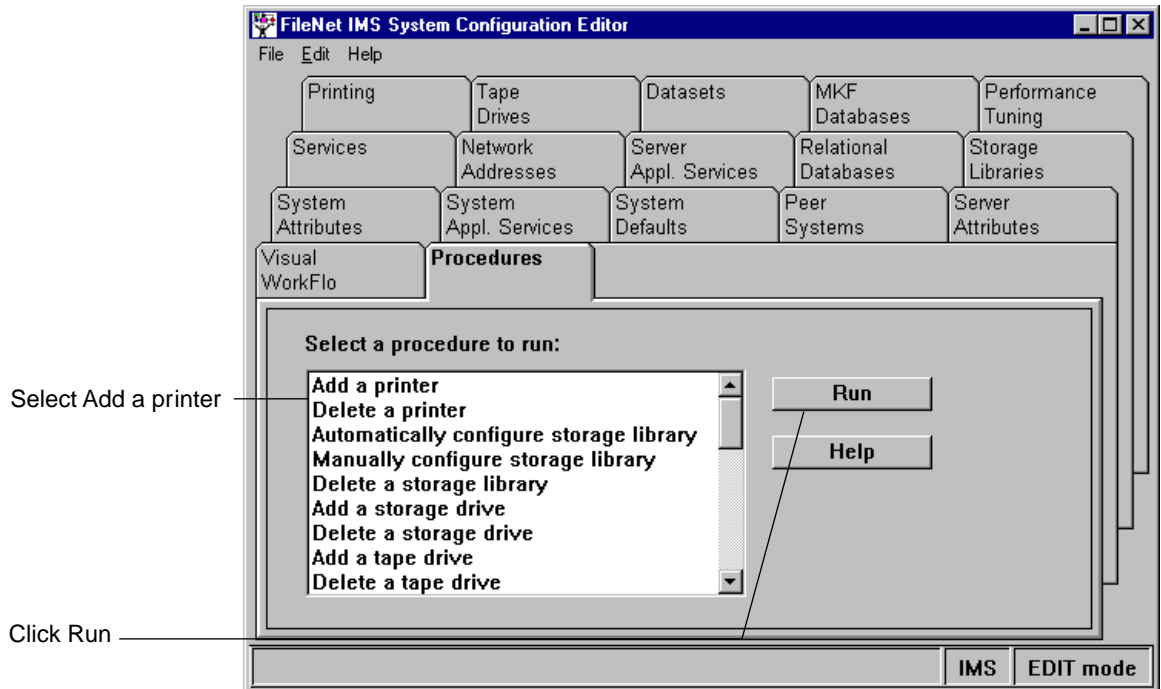
- 1** Log on to the IDMIS server as FNSW. You must have administrator rights and permissions to perform the procedures listed in this section.
- 2** Open a DOS window by double-clicking the MS-DOS Prompt icon in the Main program group.

- 3 At the DOS prompt, type **fn_edit** and press the Enter key. The Open Configuration Database dialog box displays.

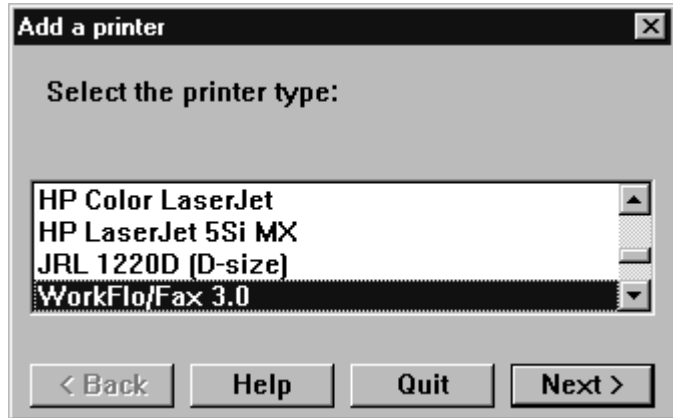


- 4 Verify that the Read Only checkbox is not checked and click OK.

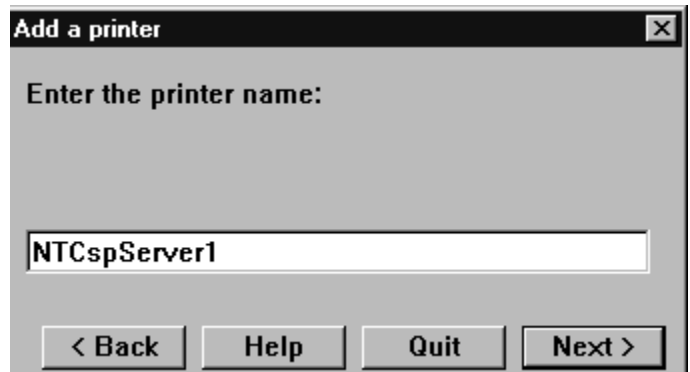
The FileNET IDMIS System Configuration Editor dialog box displays.



- 5 In the Procedures tab, select Add a printer and click Run. The Add a printer dialog box displays.



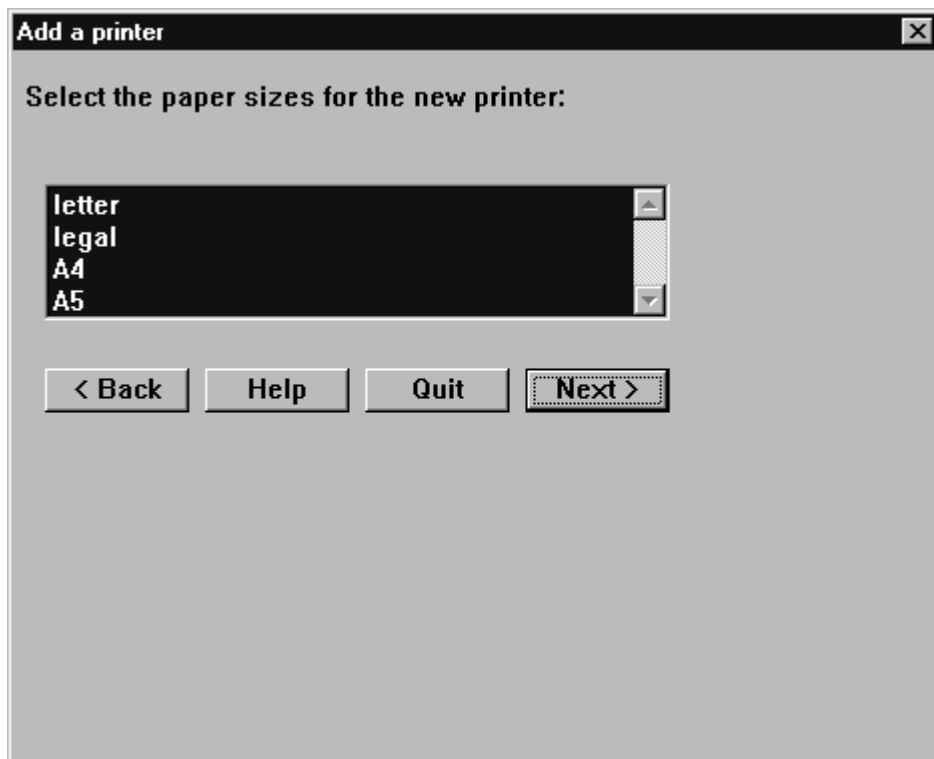
- 6 Select Panagon Fax 2.0, or if your selection has not been updated (as illustrated), select WorkFlo/Fax 3.0. Click Next.



- 7 Enter the fax server name that is easily recognizable as the Panagon Fax server. Consider using the Windows NT computer name assigned to the Panagon Fax server PC. Click Next.



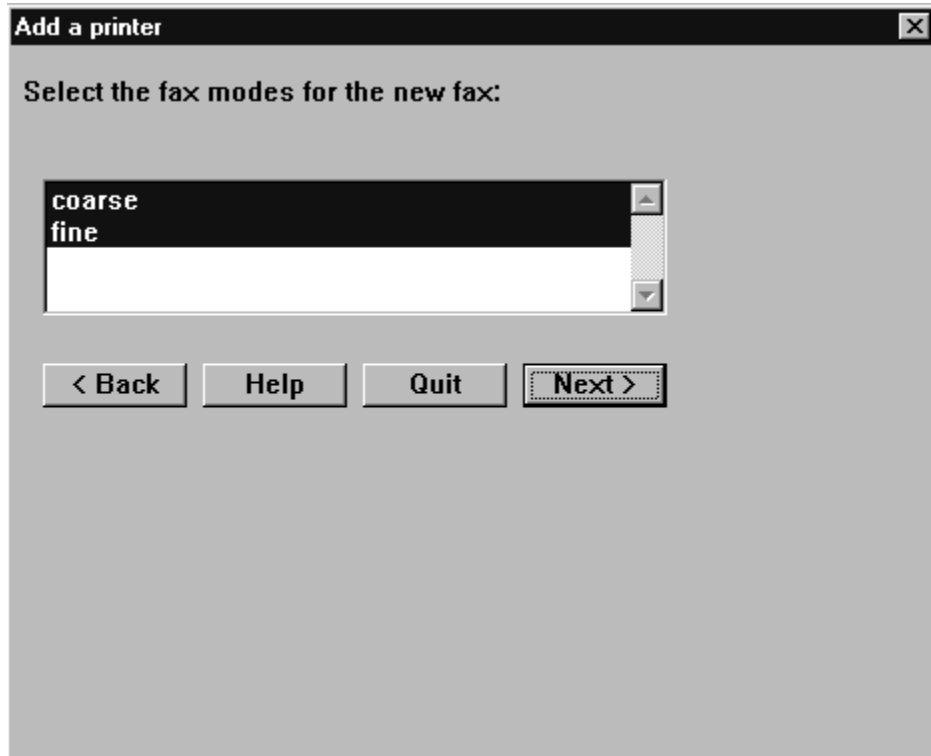
- 8 Enter the fax server's TCP/IP address and click Next.



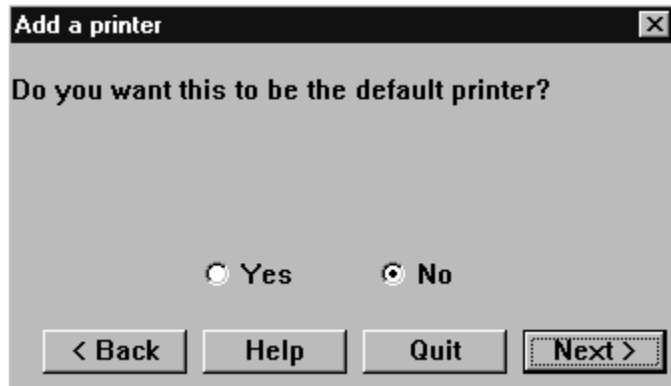
- 9 Select all four sizes of paper if not selected by default.

Tip Hold down the Shift key and select the first size and the last size to select all four sizes.

Panagon Fax uses the paper sizes to scale the faxed image. Click Next.

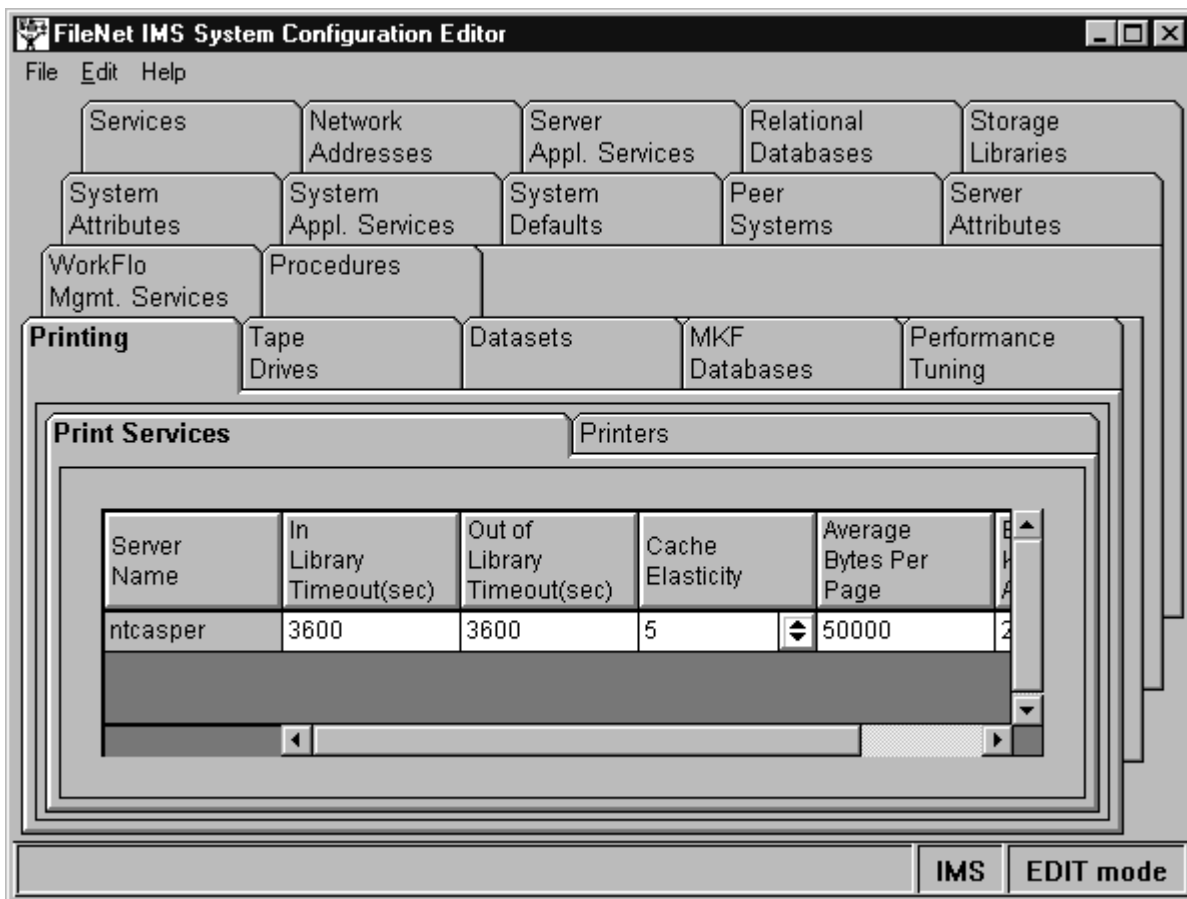


- 10 Accept the default selections to support both course and fine modes. Click Next.



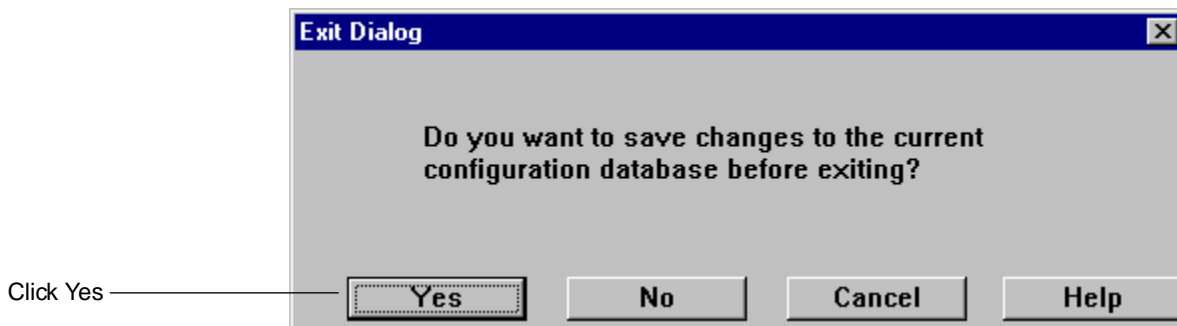
- 11 Select No to specify that the fax server is not the default printer and click Next.
- 12 A dialog box will inform you that the edit procedure completed successfully. Press OK.

The Add a printer dialog box closes and the FileNET IDMIS System Configuration Editor dialog box displays again.



- 13 Verify that the fax server information you just entered displays by selecting the Printing tab. Verify that the fax server displays and the printer information is correct.
- 14 From the File menu, choose Save to save the configuration settings.

- 15 Proceed with the configuration process, depending on what you want to do:
 - If you want to configure additional printers, repeat [Step 5 on page 69](#) through [Step 14 on page 75](#), as necessary.
 - If you have completed configuring printers, go to [Step 16 on page 76](#).
- 16 From the File menu, choose Close to exit the FileNET IDMIS System Configuration Editor dialog box. The Exit Dialog box displays.



- 17 Click Yes to save the configuration settings and exit the Configuration Editor dialog box.
- 18 After you configure your printers with the Configuration Editor, you must rebuild the configuration file with the fn_build utility. For more information, refer to the section ["Building the Configuration Files" on page 77](#).

Building the Configuration Files

After you configure your printers with the Configuration Editor, you must rebuild the configuration file with the `fn_build` utility.

- 1 Log on as **fns**, if you are not already logged on.
- 2 In the Main program group, double-click the MS-DOS command prompt icon. At the DOS prompt, type **fn_build -a** and press the Enter key.
- 3 Make sure this command runs successfully by checking that no errors occur.
- 4 At the DOS command prompt, type:

nch_tool
- 5 At the `nch_tool` prompt, type:

listproperties <printer name>

where **<printer name>** is the three-part NCH name with the name of the fax server you configured.

If your printer was successfully configured, a message similar to the following displays:

```
Properties for phong;nt5:FileNet
<addressList, [153.0.6.84, 32769]>
<printer "fax server 1">
<printerDesc, 2 0 Fax Server:nt5:FileNet 2>
```

If the configuration fails, an error message similar to the following displays:

```
...unable to list properties
<156,5,07 NCH wrongserver error hint: hint:NT:FileNet>
```

Installing the Network Fax Server Software

Panagon Fax is designed to work with a third-party, LAN-based, stand-alone fax server software package. Within the Panagon Fax application, this third-party server software is referred to as the *Network Fax Server*. At this time, Panagon Fax interacts only with the Optus FACSys Fax Messaging Gateway for Windows NT version 4.1.

Panagon Fax uses features provided by the Network Fax Server software to process inbound and outbound images.

You may want to install the entire FACSys Messaging Gateway package to access its complete feature set. However, to implement Panagon Fax, you must install and configure only those components discussed in this chapter.

Note

The information in this chapter describes only those steps required to install version 4.1 software for use with Panagon Fax. It does not discuss parameters or features that Panagon Fax does not use. For information on a parameter or feature not discussed in this section, consult the documentation included with the FACSys software.

The information in this chapter is derived from the FACSys documentation and is provided as a convenience to simplify the installation process. For a complete description of the Optus FACSys software, refer to the FACSys documentation and online help.

DID and DTMF Functionality

Optus FACSys version 4.1 can use DID and DTMF for routing faxes to FACSys users.

Panagon Fax 2.0 ships with 10 FACSys client licenses. One of these client licenses is used by Panagon Fax 2.0. This leaves nine additional client licenses for miscellaneous FACSys users. Customers can program the FACSys software to route faxes directly to a FACSys user's Receive folder based on DID or DTMF data. Be aware that any faxes meant for Panagon Fax should be routed to the FACSys user assigned to Panagon Fax. For an overview of DID and DTMF, refer to [Chapter 1, "Overview," on page 24.](#)

Installation Overview

Software installation, as described in the FACSys Messaging Gateway manual, consists of the following steps.

- 1 Install the FACSys software on the Panagon Fax server PC.

The FACSys software includes the FACSys Fax Server service, which loads automatically under Windows NT each time the fax server PC boots up. For more information, refer to the section ["Installing the Network Fax Server Software" on page 83.](#)

- 2 If necessary, install any service packs Optus has issued. Refer to this Web site and download your selection:

WWW.FACSYS.COM/SUPPORT.HTML

For more information, refer to the instructions provided with the service pack(s).

- 3 Install the FACSys client license software. For more information, refer to the section [“Installing the Client Licenses” on page 90](#).
- 4 Create a Windows NT User Account with Administrator privileges, then associate it with the Optus FACSys server service. The FACSys server software logs on to Windows NT with this user name. For more information, refer to the section [“Setting Up a Windows NT User Account for FACSys” on page 91](#).
- 5 Configure the FACSys Server software so it will work with Panagon Fax. Configuration includes the following steps.
 - a Log on to the FACSys software as an Administrator. For more information, refer to the section [“Logging On to FACSys” on page 103](#).
 - b Change the FACSys software Administrator’s password from its default value. For more information, refer to the section [“Changing the FACSys Administrator Password” on page 107](#).
 - c Define a FACSys User Name and Password for Panagon Fax. For more information, refer to the section [“Defining a FACSys User Name and Password” on page 109](#).
 - d Use the FACSys software to install and configure drivers for each of the fax cards installed in the fax server. For more information, refer to the section [“Installing and Configuring the Fax Card Drivers” on page 117](#).
 - e Configure incoming fax routing options. For more information, refer to the section [“Configuring an Incoming Fax Routing Option” on page 136](#).

- 6 Install the FACSys Client software on the fax server so you can test the installation and create or edit the fax cover page. For more information, refer to the section [“Installing the FACSys Client Software” on page 160](#).
- 7 Test the installation to ensure that you can send and receive faxes.

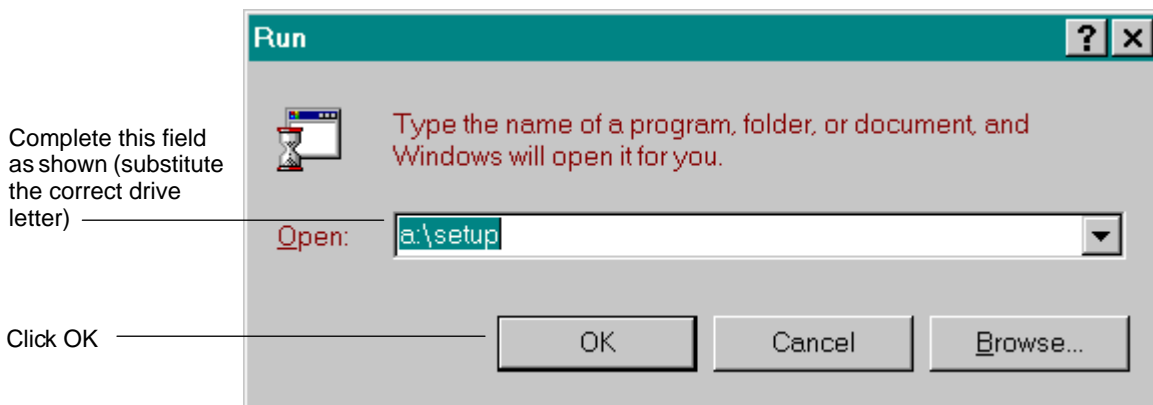
Installing the Network Fax Server Software

Use the Setup utility on the Optus FACSys Fax Messaging Gateway Server diskettes to install the FACSys server software.

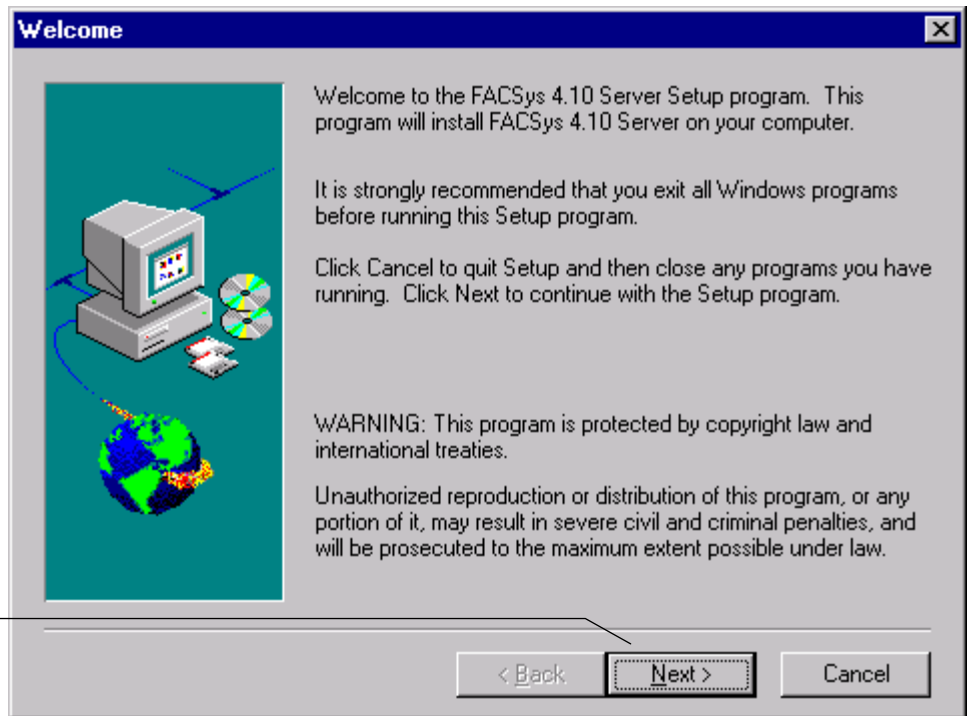
- 1 Insert the diskette labeled Disk 1 in your computer's floppy drive.
- 2 From the taskbar, click Start and select Run.
- 3 In the Open text box, type:

<x>:\setup

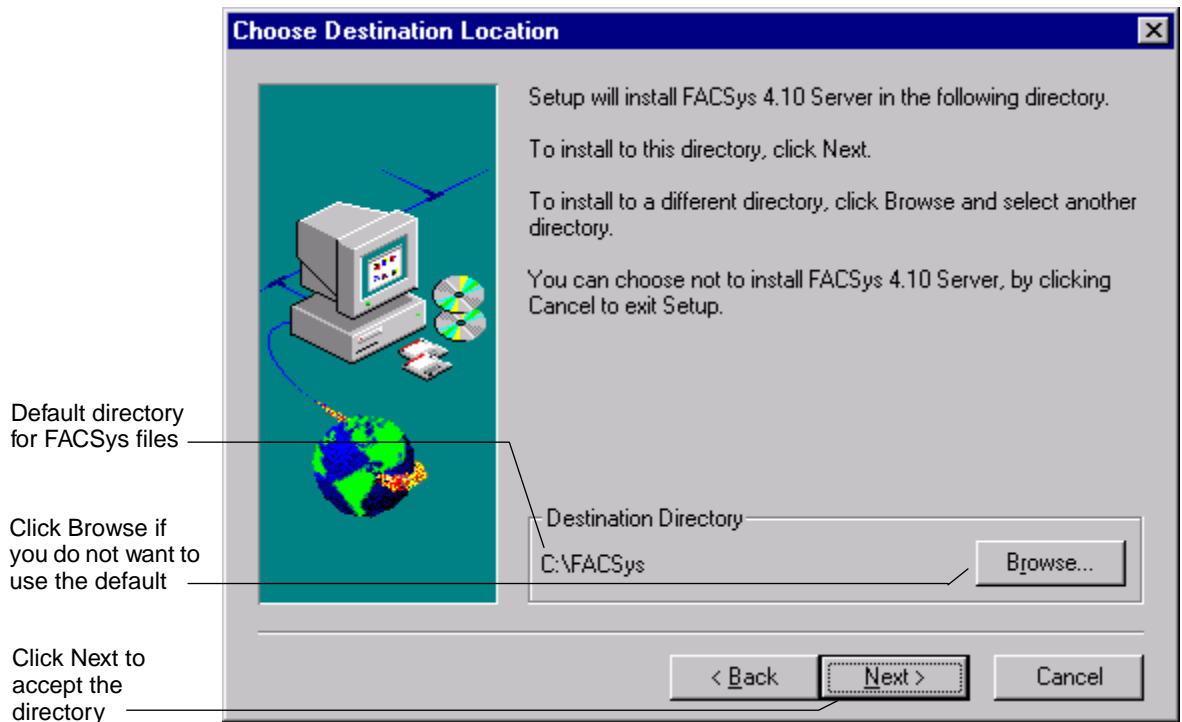
where **<x>** represents the drive letter mapped to the floppy drive in which you inserted Disk 1.



- 4 Click OK. Setup loads, and a dialog box with a Welcome screen displays.



- 5 Click the Next button. The Choose Destination Location screen displays.

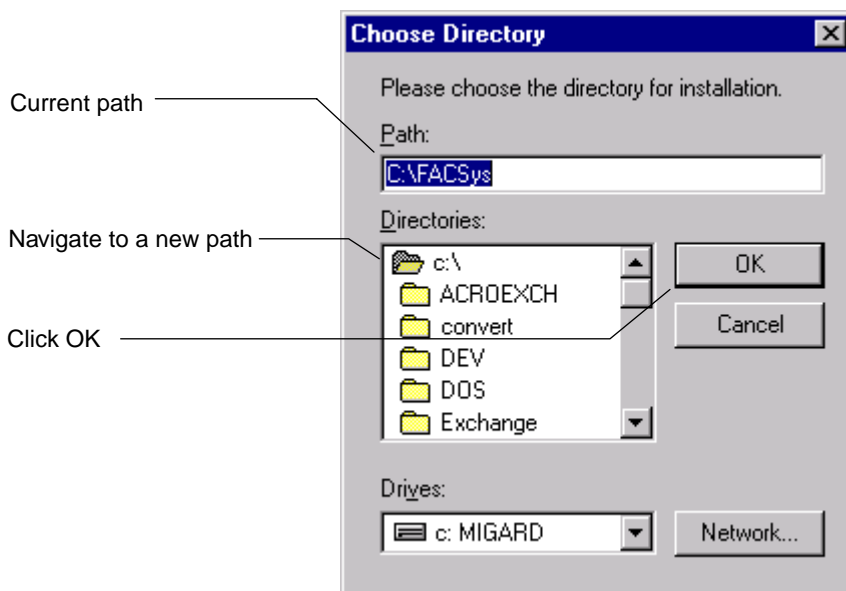


- 6 The currently selected directory displays in the Destination Directory field. By default, the Setup utility installs the FACSys software in the C:\FACSys directory.

Proceed as follows, depending on what you want to do:

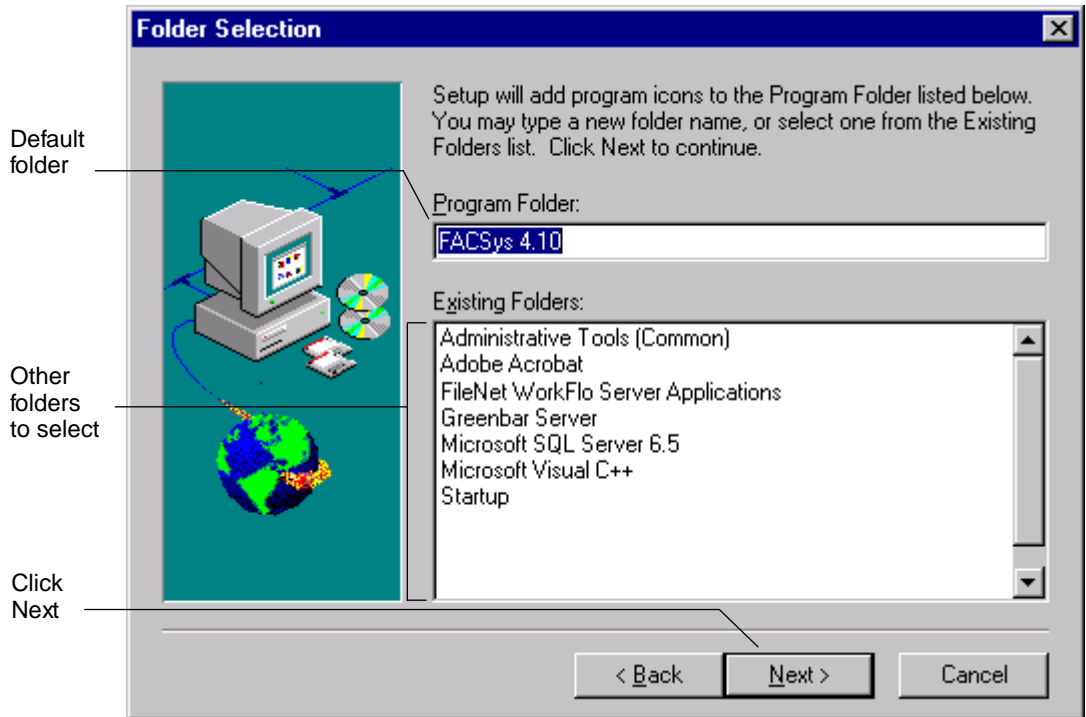
- If you want to install FACSys in a different directory, click the Browse button, and proceed to [Step 7 on page 86](#).

- If this default directory is acceptable, proceed to [Step 9 on page 87](#).



- 7 The Choose Directory dialog box displays, and the current path displays in the Path field. You can do either one of the following:
 - Delete the old path and type a new one in the Path field, or
 - Select a drive and directory from the Drives and Directories list boxes. The Network button lets you browse your network drives.
- 8 When the information in the Path field is satisfactory, click OK to close the dialog box (or click Cancel to close the Choose Directory dialog box without changing the current path). This takes you back to the Choose Destination Location dialog box.

- 9 On the Choose Destination Location dialog box, click Next to continue the Setup process. The Folder Selection screen displays.

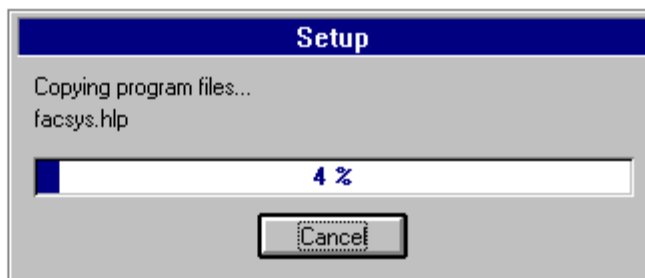
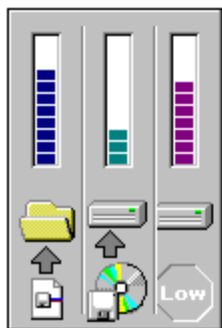


- 10 By default, the Setup utility creates a FACSys 4.10 program folder that contains the FACSys program icons.
- If this default program folder is acceptable, click the Next button to continue with the Setup process.
 - If you want to place the FACSys program icons in a different program folder, either:

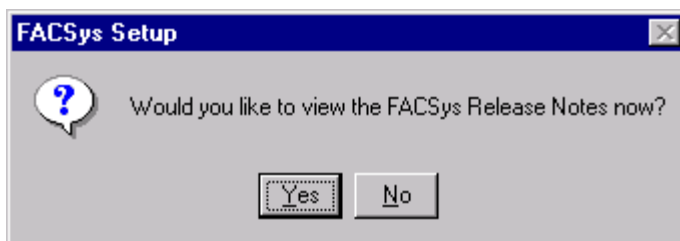
- Type a new folder name in the Program Folder field, or
- Select a folder from those displayed in the Existing Folders list box

When you are satisfied with the name in the Program Folder field, click Next to continue with the Setup process.

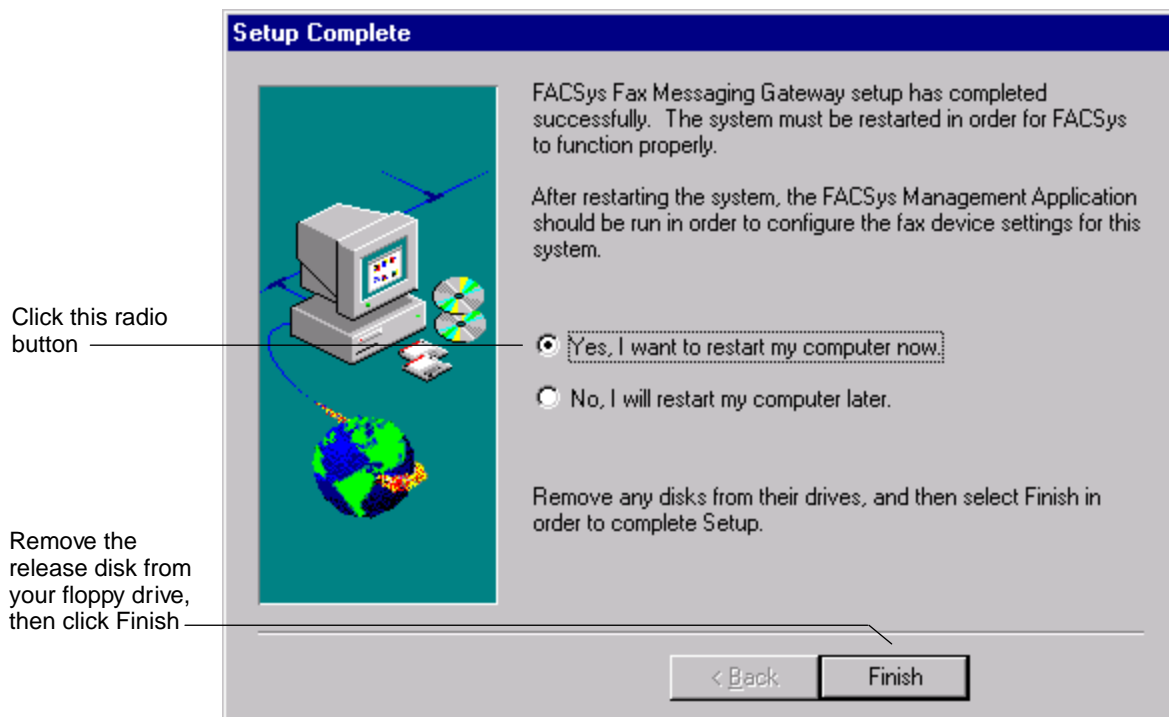
- 11** The Setup utility stops any FACSys services that are running (if you are upgrading from a previous installation), then starts copying program files from the release disks. Insert the release disks into your computer's floppy drive when Setup prompts you.



- 12** When all the software has been copied, the FACSys Setup screen displays prompting you whether you want to read the FACSys Release Notes. Click the Yes button to read the notes or the No button to skip the notes.



The Setup Complete screen displays.



- 13** You must restart the computer for the FACSys software to initialize. To complete this task, perform the following steps:
- a Select the radio button “Yes, I want to restart my computer now.”
 - b Remove the release disk from the floppy drive.
 - c Click Finish.

Setup automatically shuts down, then restarts Windows NT. When the server restarts, the FACSys server software runs automatically as a native Windows NT service.

Installing the Optus Service Pack

Install your Optus Service Pack 4 at this point.

Refer to this Web site and download your selection:

WWW.FACSYS.COM/SUPPORT.HTML

Refer to the instructions with Service Pack 4.

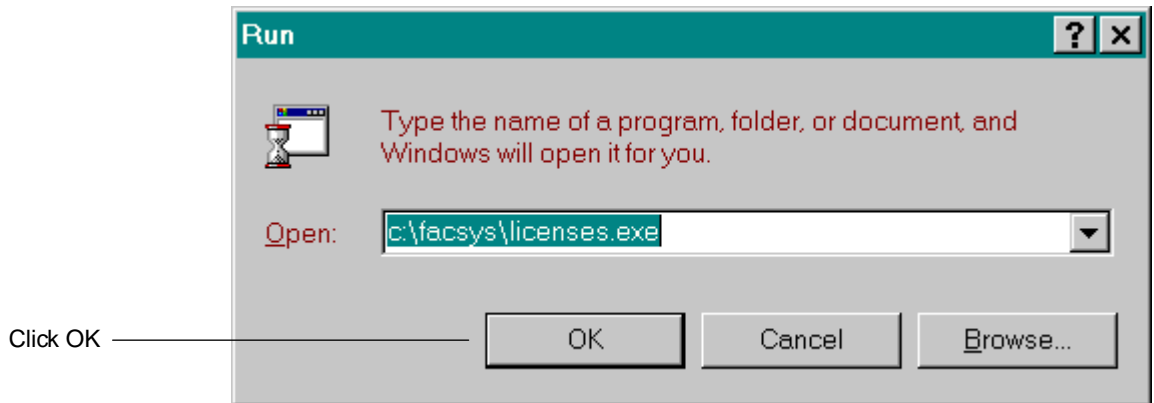
Installing the Client Licenses

The FACSys software comes with a set of 10 client licenses on a separate disk. You must install the license software before you can create users (such as the Panagon Fax user) within the FACSys software.

To install the client licenses, perform the following steps.

- 1** Insert the client license disk in your computer’s floppy drive.

- 2 From the taskbar, click Start and select Run to run the LICENSES.EXE file. A default directory displays if you selected default settings during installation. Otherwise, the directory in which you installed the FACSys software displays.
- 3 Click OK to accept the directory.



- 4 When the license installation software starts, a screen informs you that you are agreeing to certain conditions. Click the Proceed button.
- 5 When installation is done, a screen informs you that the software was installed successfully. Click OK.

Setting Up a Windows NT User Account for FACSys

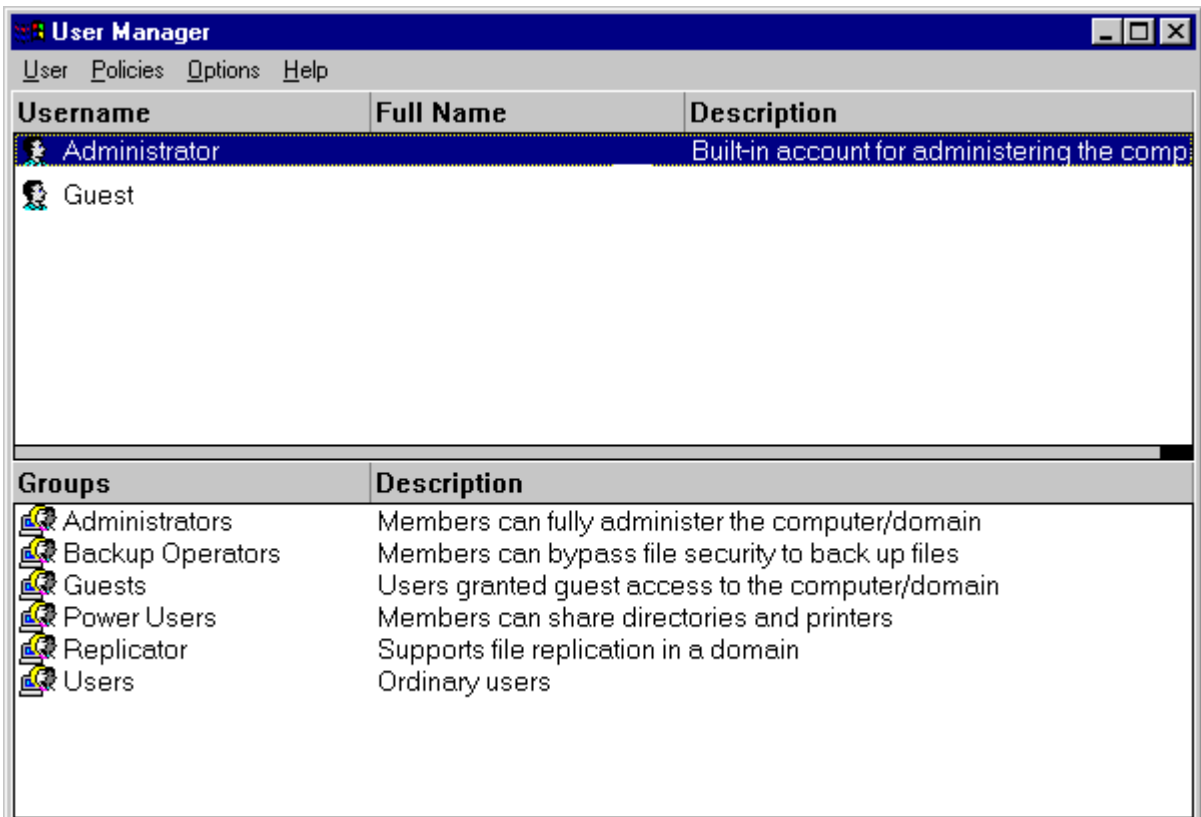
After you install the FACSys software, you must create a Windows NT user account. The FACSys server software will log on to Windows NT with this user name. You will configure this logon to be performed automatically.

Creating the User Account

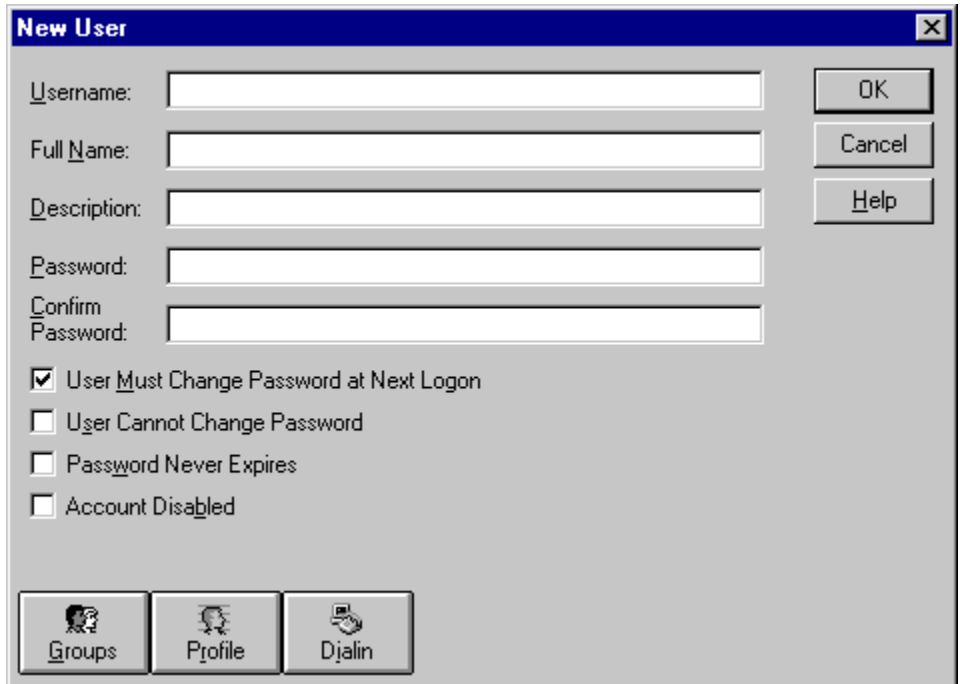
To create a Windows NT user account, perform the following steps.

- 1 From the taskbar on the server, click Start and select Programs, Administrative Tools, and User Manager.

A User Manager dialog box similar to the following displays.



- From the User menu, choose New User. The New User dialog box displays.



New User

Username:

Full Name:

Description:

Password:

Confirm Password:

User Must Change Password at Next Logon

User Cannot Change Password

Password Never Expires

Account Disabled

- In the New User dialog box, define the new user account.

New User

Username: FACSys

Full Name: FACSys Fax Messaging Gateway

Description:

Password: *****

Confirm Password: *****

User Must Change Password at Next Logon

User Cannot Change Password

Password Never Expires

Account Disabled

OK

Cancel

Help

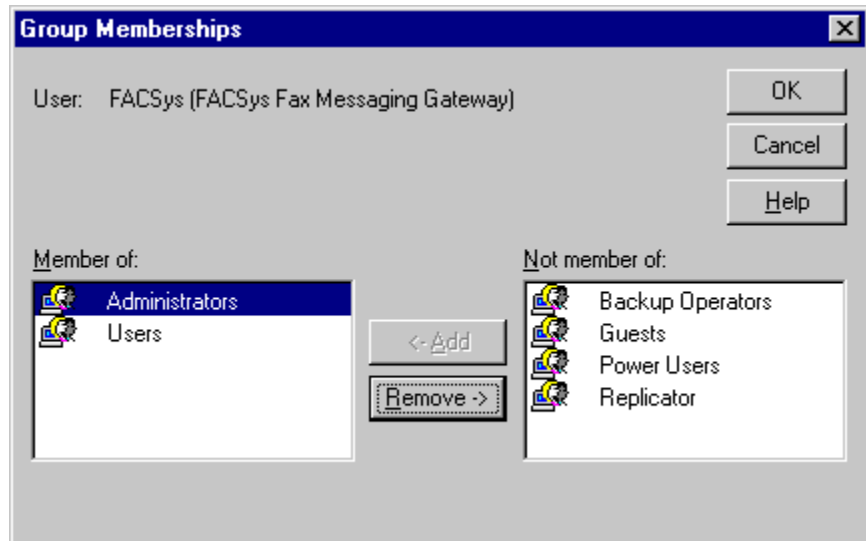
Groups Profile Dialin

- a Enter the following information for the new user account.

Field Name	Action
Username	Enter FACSys.
Full Name	Enter FACSys Fax Messaging Gateway.
Description	Enter a description. This description field is optional.
Password	Enter a password. The password displays as a series of asterisks to protect its confidentiality.

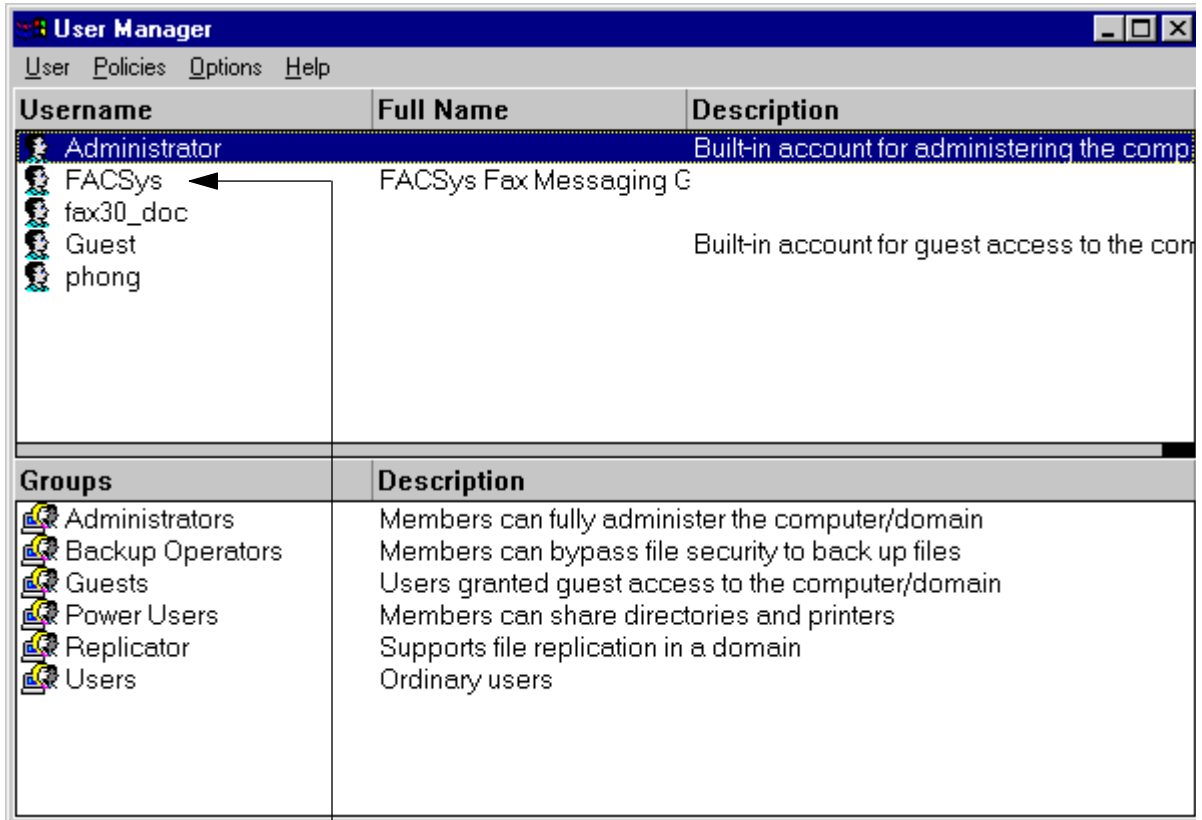
Confirm Password	Enter the password a second time. Be sure that you enter an exact duplicate of the password you entered in the Password field.
Password Never Expires	Enable this option.

- b On the New User dialog box, click the Groups button. The Group Memberships dialog box displays.



- 4 To make the new account a member of the Administrators group, select Administrators in the “Not member of” list box on the right side of the screen, then click the Add button. The Administrators group will move to the left side of the screen in the “Member of” list box, as previously shown.

- 5 Click OK in the Group Memberships dialog box, then click OK in the New User dialog box. This takes you back to the User Manager dialog box, as the next illustration shows.
- 6 In the User Manager dialog box, verify that the user FACSys displays under the Username column (the full name truncates, as shown in the following dialog box).



Verify that the user FACSys displays

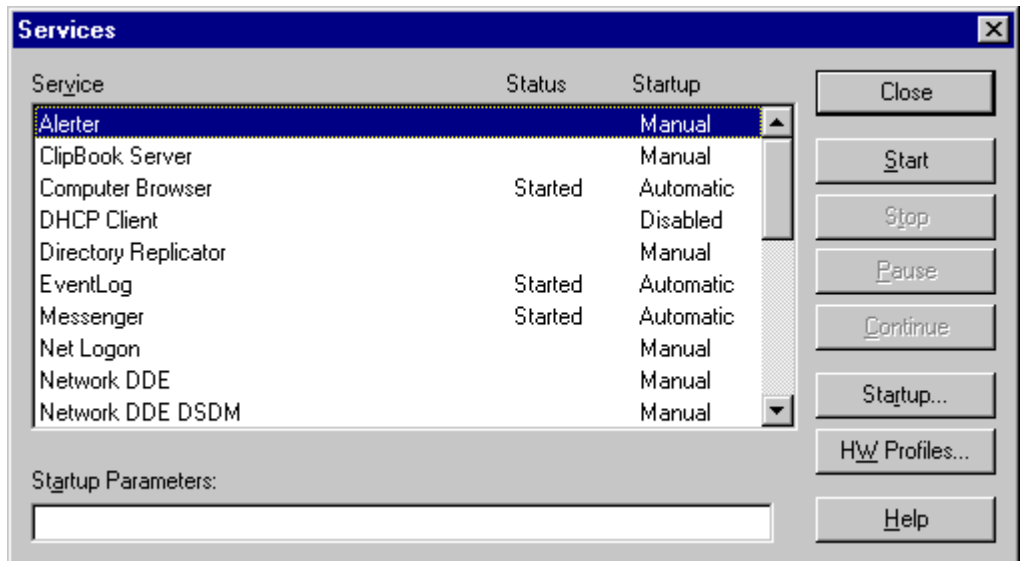
7 Exit the User Manager dialog box.

Configuring FACSys to Log On as New Windows NT User

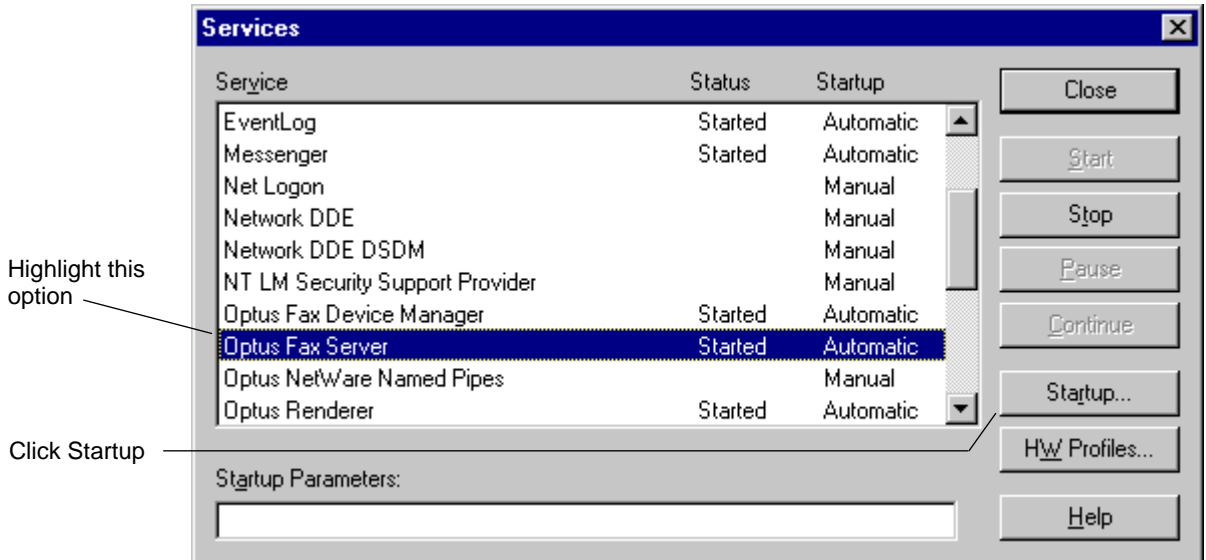
During the next part of the installation, you must configure the Optus FACSys server service to log on as the new user "FACSys".

To complete this configuration, perform the following steps.

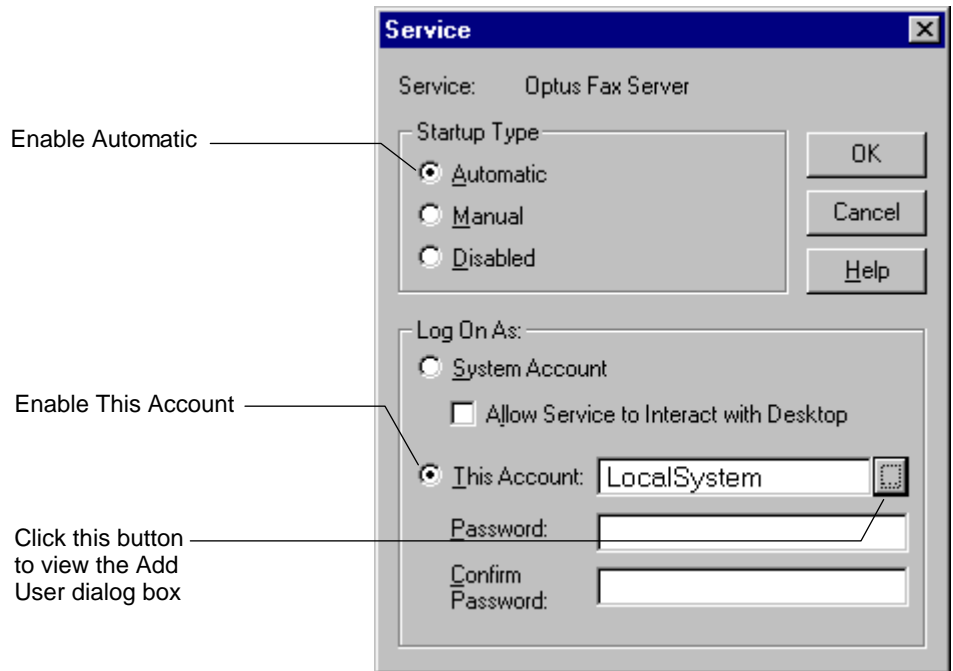
- 1 In the Settings group, open the Control Panel, then double-click the Services icon. The Services dialog box displays.



- 2 In the Service list box, highlight the Optus Fax Server entry, as shown in the following example.

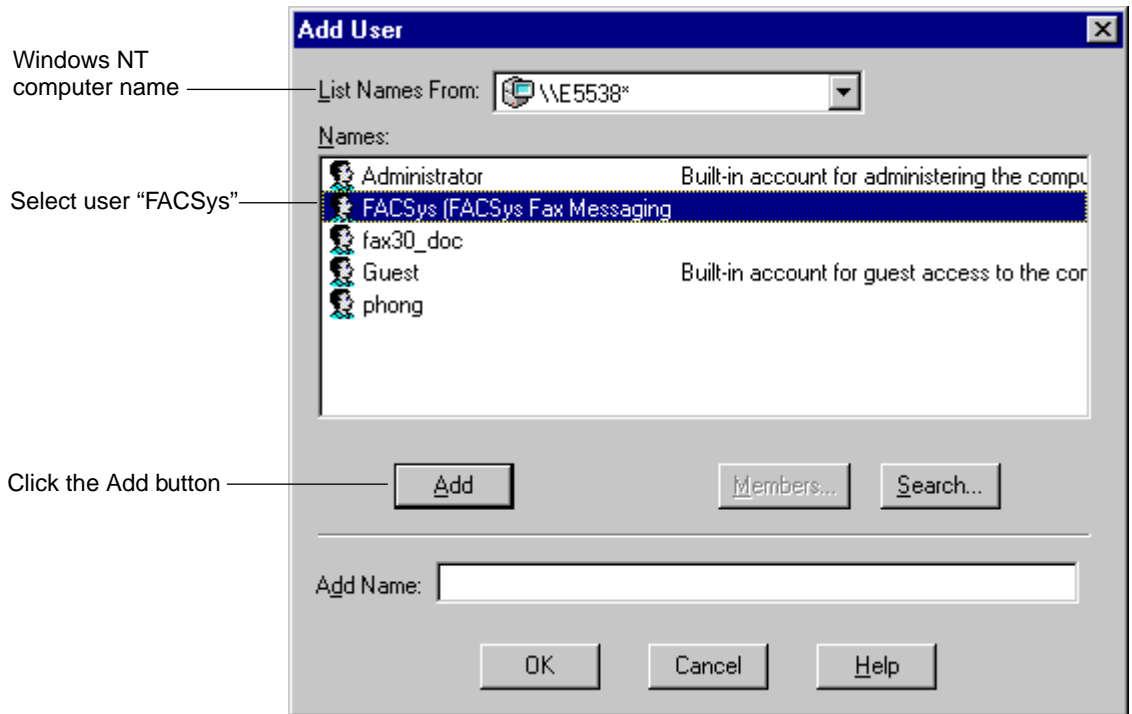


- 3 With the Optus Fax Server entry highlighted, click the Startup button. The Service dialog box displays.
- 4 To define the startup parameters for the Optus FACSys fax server service, complete the Service dialog box, as shown in the following example.



- 5 Click the button to the right of the field named This Account. The Add User dialog box displays.

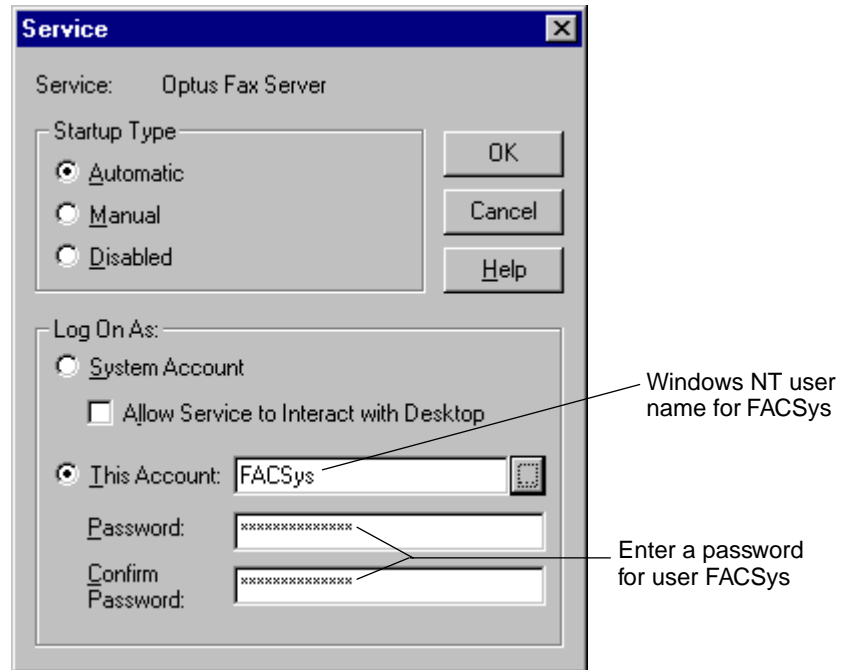
- 6 Complete the Add User dialog box, as shown in the following example.



- 7 When you click the Add button, the Add User dialog box closes, and the Service dialog box displays again.
- 8 Enter a password for the FACSys user account by performing the following steps:

Note The password displays as a series of asterisks to protect its confidentiality.

- a In the Password field, enter the password you configured when you created the Windows NT user account.
- b In the Confirm Password field, enter an exact duplicate of the password you entered in the Password field.



- c Click OK. The following message displays:

The account FACSys has been granted the Log On As A Service Right

- d Click OK, then click the Close button on the Services dialog box to exit the Services program.

Configuring FACSys

You must configure the FACSys software so that it will work with Panagon Fax.

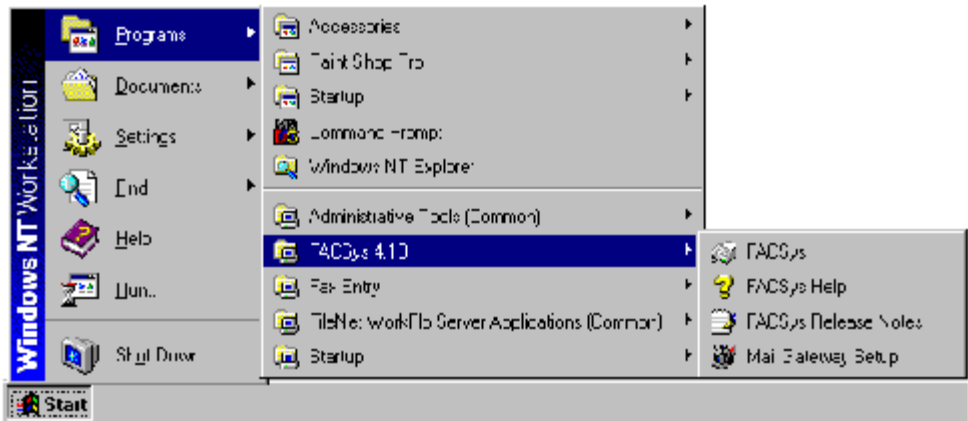
Configuration consists of the following steps. For more details about each step, refer to the corresponding section indicated.

- Log on to FACSys as the FACSys Administrator. Refer to the section [“Logging On to FACSys” on page 103](#).
- Change the FACSys Administrator password. Refer to the section [“Changing the FACSys Administrator Password” on page 107](#).
- Define a FACSys user name and password for Panagon Fax. Refer to the section [“Defining a FACSys User Name and Password” on page 109](#).
- Install and configure the fax card drivers. Refer to the section [“Installing and Configuring the Fax Card Drivers” on page 117](#).
- Configure an incoming routing option. Refer to the section [“Configuring an Incoming Fax Routing Option” on page 136](#).

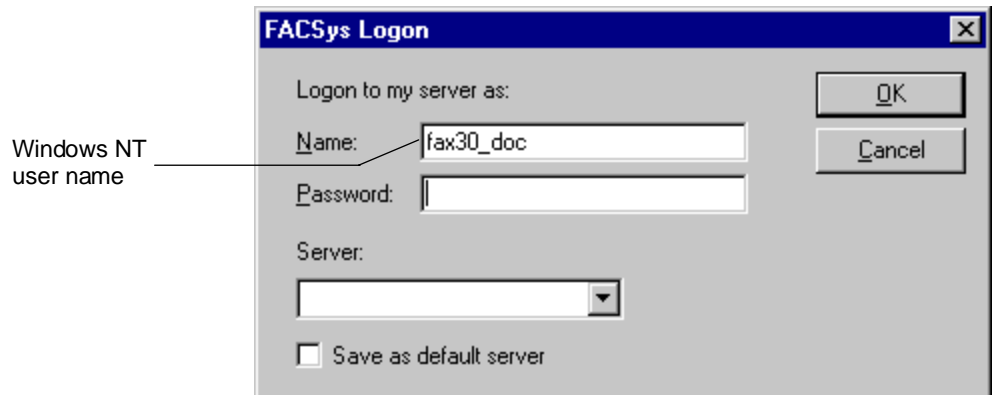
Logging On to FACSys

Before you can configure the FACSys software to work, you must log on to FACSys as the FACSys administrator.

- 1 To start the FACSys software, from the taskbar, click the Start button, select Programs, FACSys 4.10, and the FACSys icon, as shown in the following example.



The FACSys Logon dialog box displays. As a default entry, the Windows NT user name you used to log on to your computer displays in the Name field.

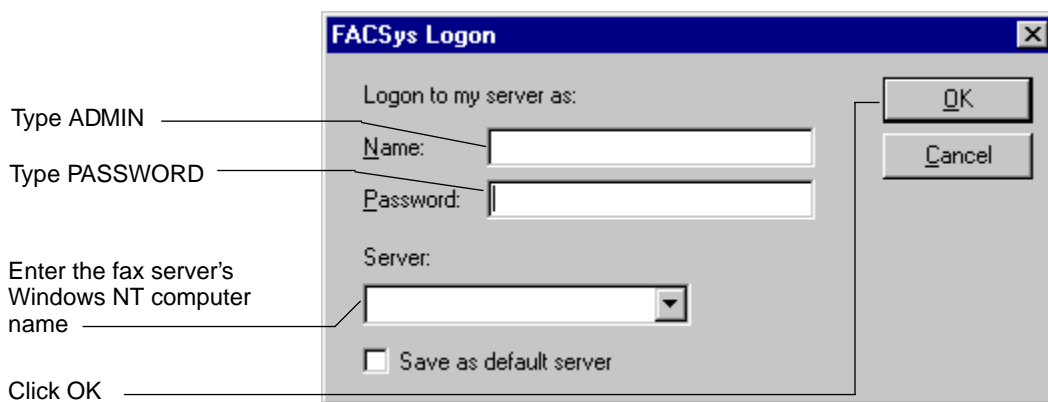


- 2 You must log on as an Administrator. To do this, perform the following steps.
 - a In the Name field, delete the default name, and enter the following user name and password in all uppercase:

ADMIN

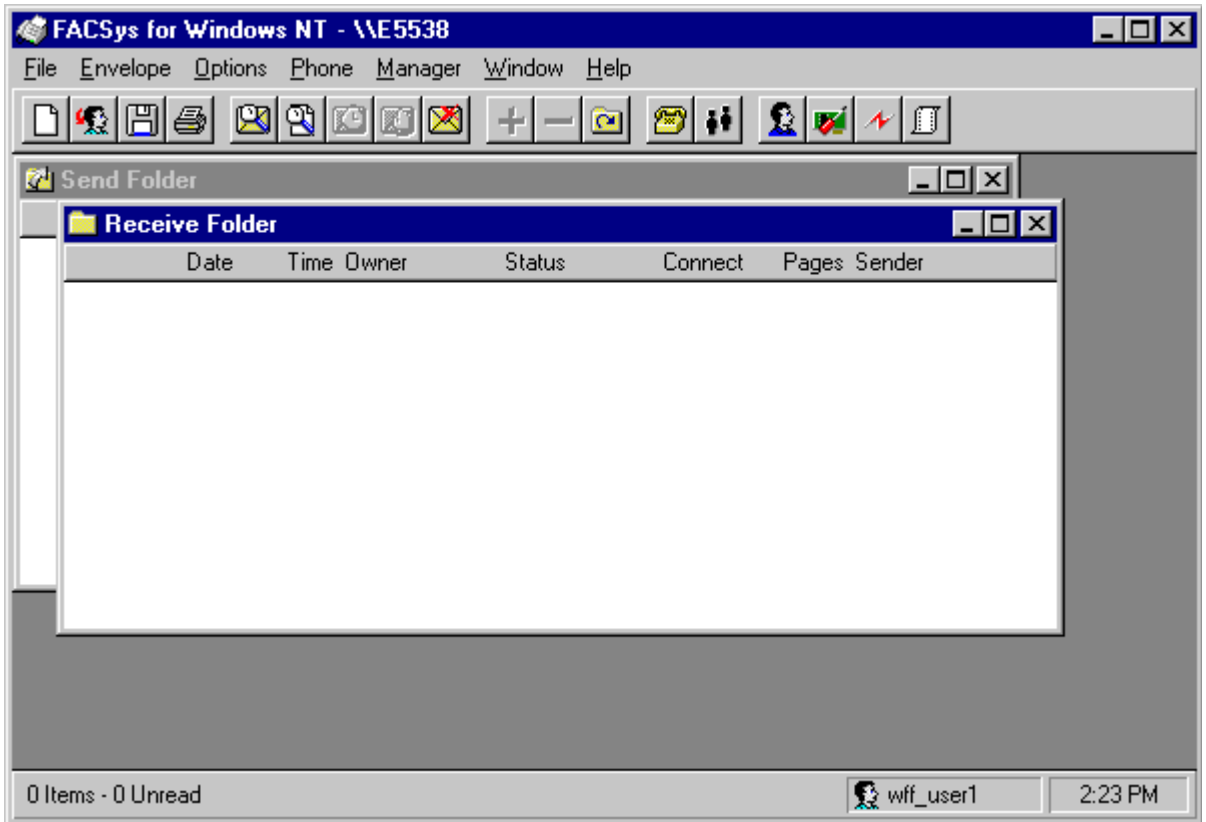
PASSWORD

Both the user name and password are case-sensitive.



- b In the Server field, enter the Windows NT name you assigned to the Panagon Fax Server.
 - c Leave the "Save as default server" checkbox unchecked.
- 3 Click OK.

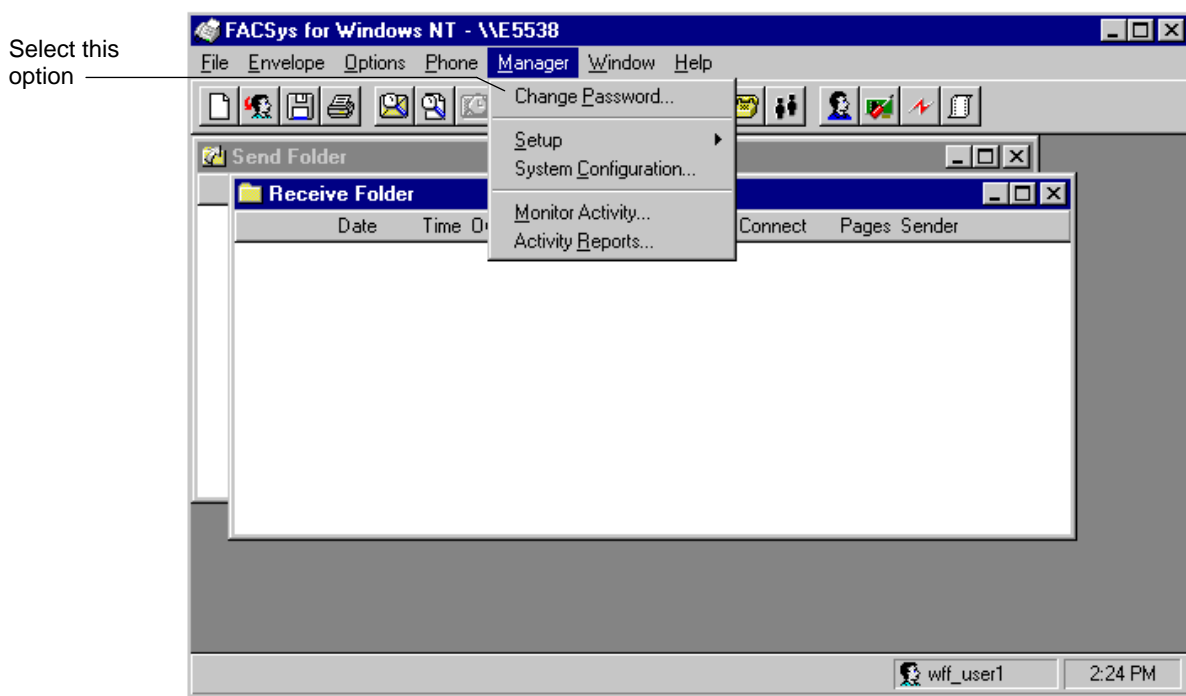
- 4 When you log on successfully to FACSys, the main FACSys for Windows NT application window displays.



Changing the FACSys Administrator Password

For security purposes, we recommend that you change the FACSys Administrator password (ADMIN) from its default.

- 1 From the main FACSys for Windows NT window, select the Manager menu, and select the Change Password option.

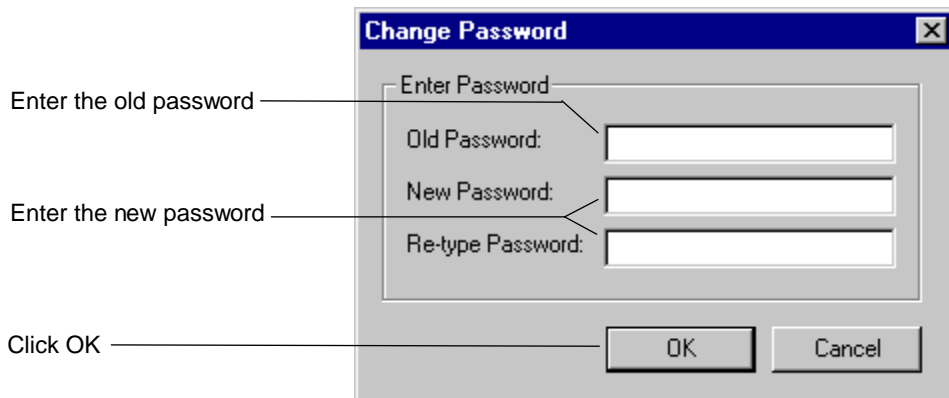


The Change Password dialog box displays.

- 2 Complete the Change Password dialog box by performing the following steps:

Note The passwords display as a series of asterisks to protect their confidentiality.

- a In the Old Password field, enter the old password. The old password is ADMIN (all uppercase).
- b In the New Password field, enter the new password. The new password is PASSWORD (all uppercase).
- c In the Re-type Password field, enter an exact duplicate of the new password you entered in the New Password field.
- d Click OK. This takes you back to the main FACSys for Windows NT application window.



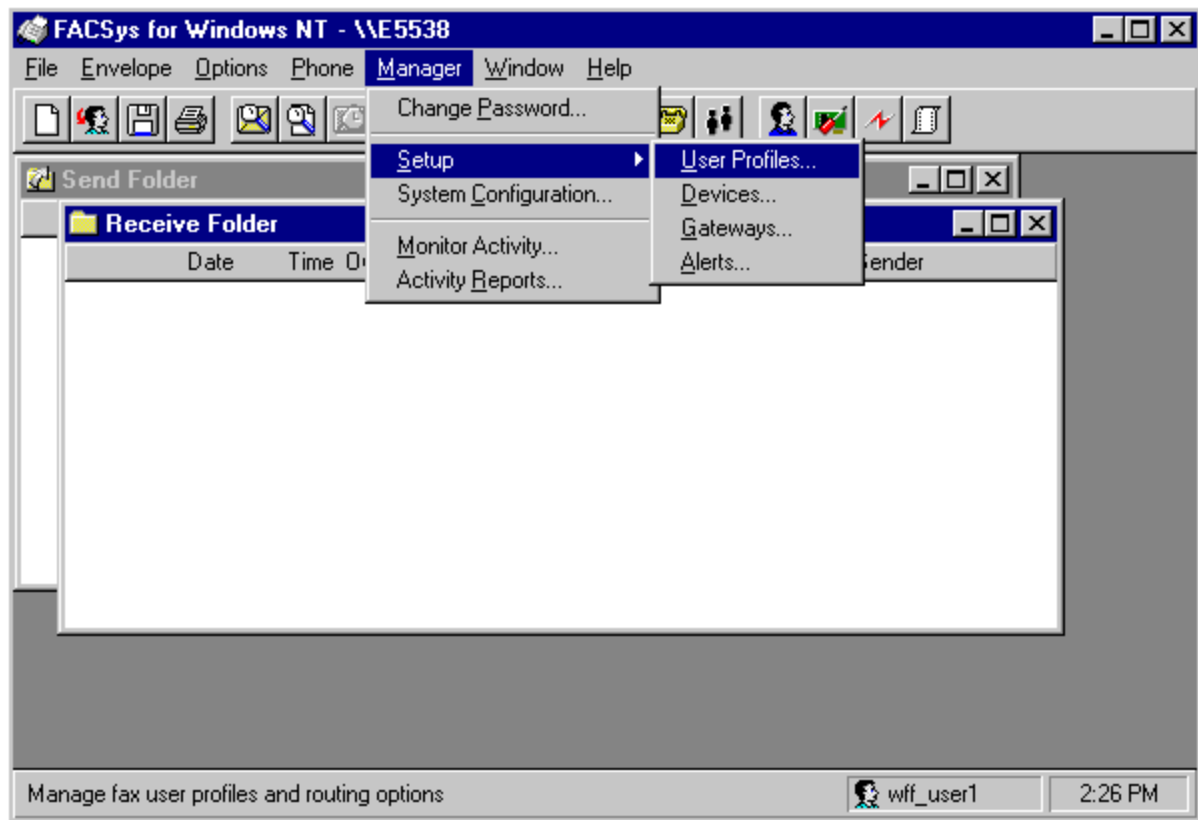
Defining a FACSys User Name and Password

Various Panagon Fax software components log on to the FACSys software as a FACSys user to send and receive FileNET images. Therefore, you must create a user name and password within the FACSys application that Panagon Fax can use.

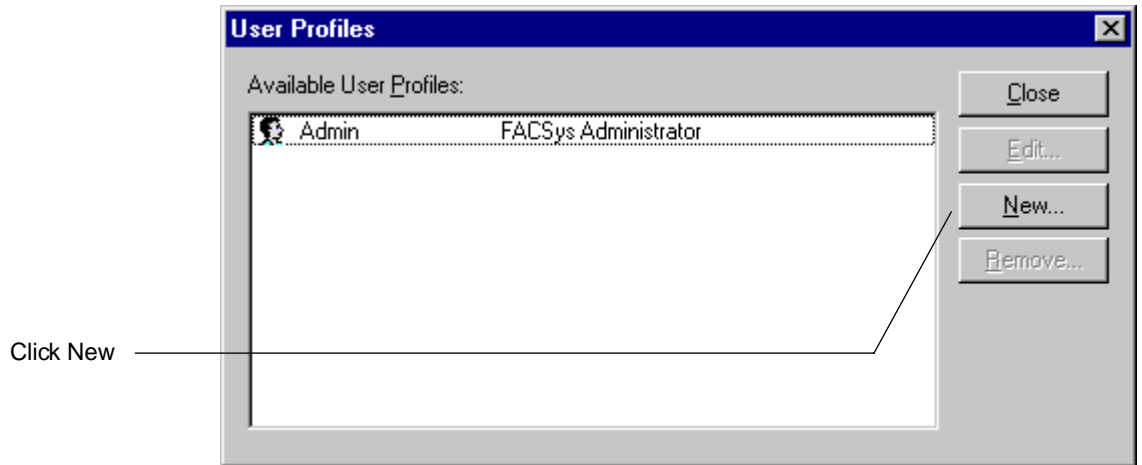
FACSys users have security privileges to ensure the integrity of the fax server environment. The Panagon Fax user must have system administrator privileges so that Panagon Fax can manipulate the FACSys fax queue.

To create a new user name and password, perform the following steps.

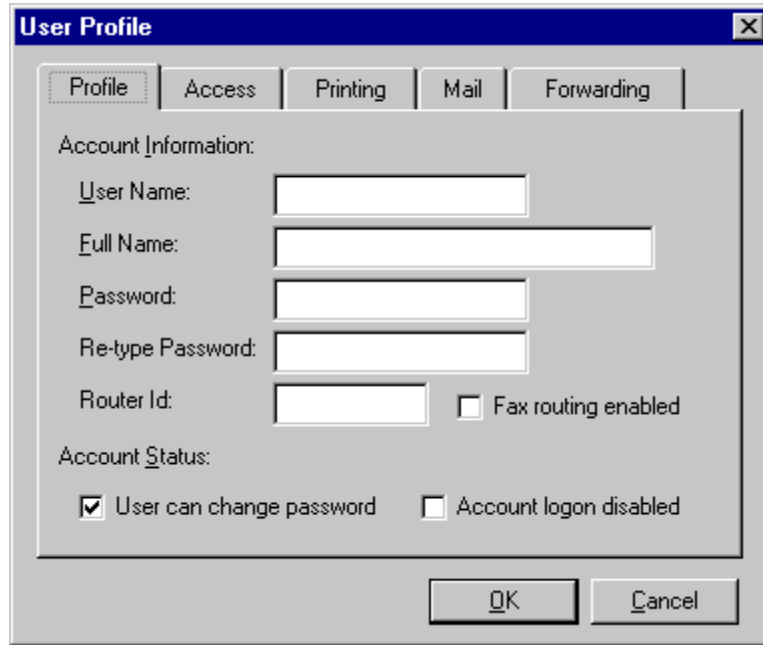
- 1 From the FACSys for Windows NT main window, select the Manager menu, then Setup and User Profiles. The User Profiles dialog box displays.



- 2 The currently defined users display in the Available User Profiles list box. On a new installation, only the Admin user displays.



- 3 Click New to add a new user. The User Profile dialog box displays.
- 4 This User Profile dialog box has a series of tabs that can be used to configure different functions. For Panagon Fax, you will only need to select the Profile and Access tabs for user profile configuration settings.



- 5 In the Profile tab, enter the information as indicated for the following fields only.

Field Name	Action
User Name	Enter the user name you want to use to log Panagon Fax on to the FACSys server. Consider using a name such as "Panagon Fax" that clearly identifies the user's function. You can enter up to 15 alphanumeric characters.
Full Name	This field is optional. Enter a more descriptive version of the user name.

4 Installing the Network Fax Server Software

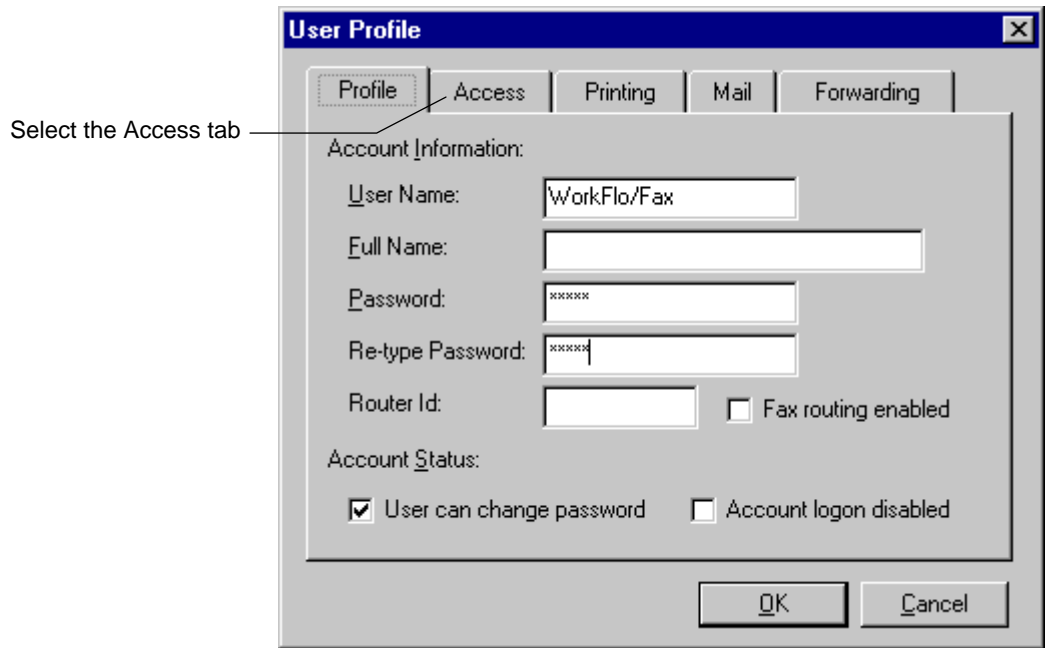
Defining a FACSys User Name and Password

Password	Enter the password you want to assign to the Panagon Fax user. The password appears as a series of asterisks to protect its confidentiality.
Re-type Password	Reenter the password you entered in the Password field. Be sure that you enter an exact duplicate of the password entered in the Password field.
Fax routing enabled	Enable (check) this checkbox. When you enable this checkbox, inbound faxes will be routed to the Panagon Fax user based on the routing options you activate in the Access tab.
User can change password	By default, this option is enabled (checked). If this option is enabled, anyone can change the Panagon Fax user's password while the Panagon Fax user is logged on. Consider disabling this option for security purposes.

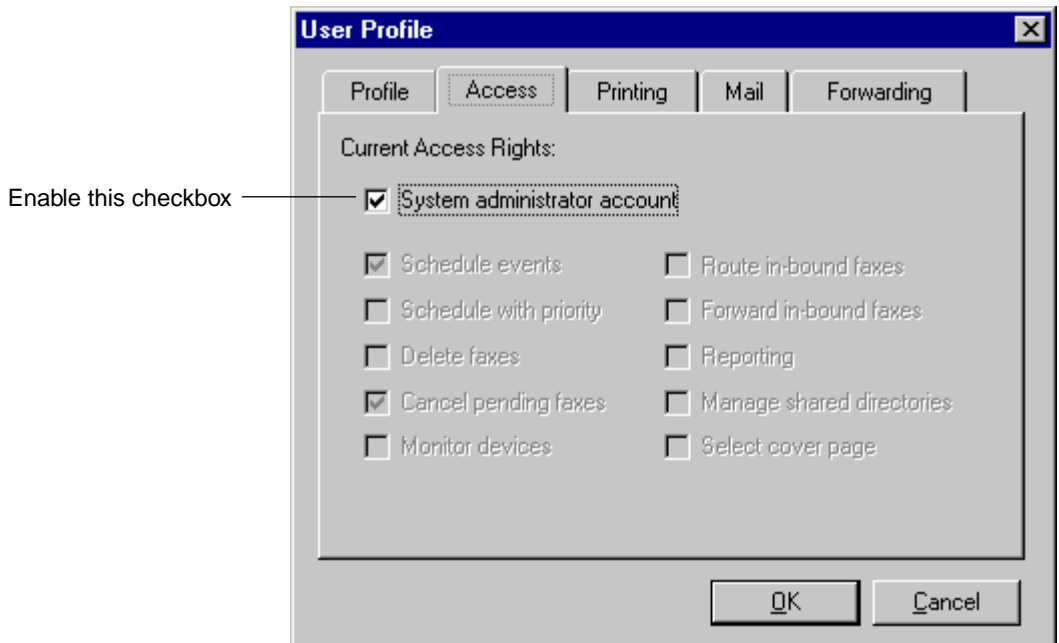
- 6 Click OK. This takes you back to the User Profiles dialog box.
- 7 From the User Profile dialog box, select the Access tab.

4 Installing the Network Fax Server Software

Defining a FACSys User Name and Password

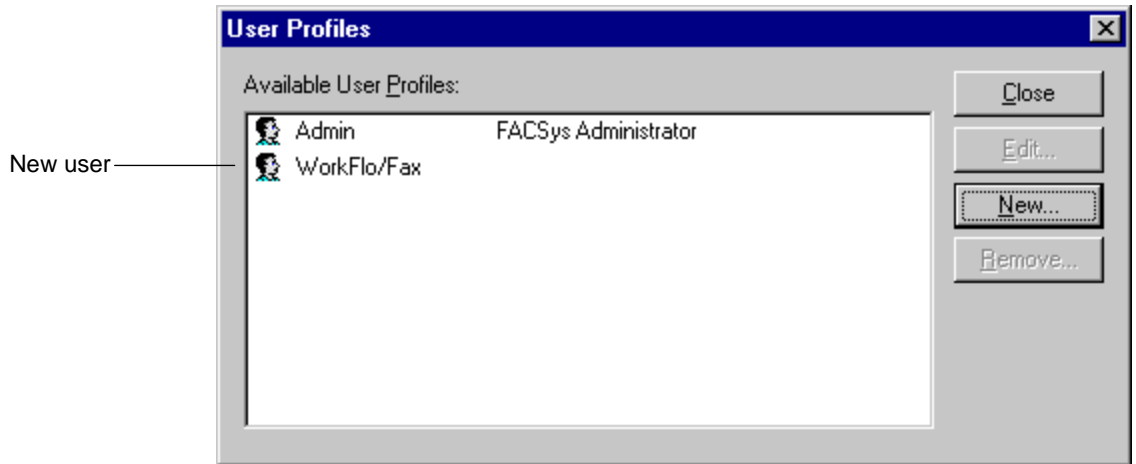


- 8 In the Access tab, enable (check) the system administrator account checkbox. When you enable this checkbox, the Panagon Fax user has Administrator privileges within the FACSys application. This allows Panagon Fax to modify the FACSys fax queue.



- 9 Click OK. This takes you back to the User Profiles dialog box.

- 10 In the User Profiles dialog box, the system adds the new Panagon Fax user to the Available User Profiles list box based on the previous steps in this procedure.



- 11 Once the user has been added to the list, you can modify this user profile.
 - a To edit a user profile, select the desired profile from the list, and click the Edit button (or double-click a highlighted user profile).
 - b To delete a user profile, select the desired profile from the list, and click the Remove button.

Note A user profile must be selected in the Available User Profiles list box for the Edit and Remove buttons to be enabled.

Installing and Configuring the Fax Card Drivers

Use the FACSys software to install and configure drivers for the fax cards installed in the Panagon Fax server.

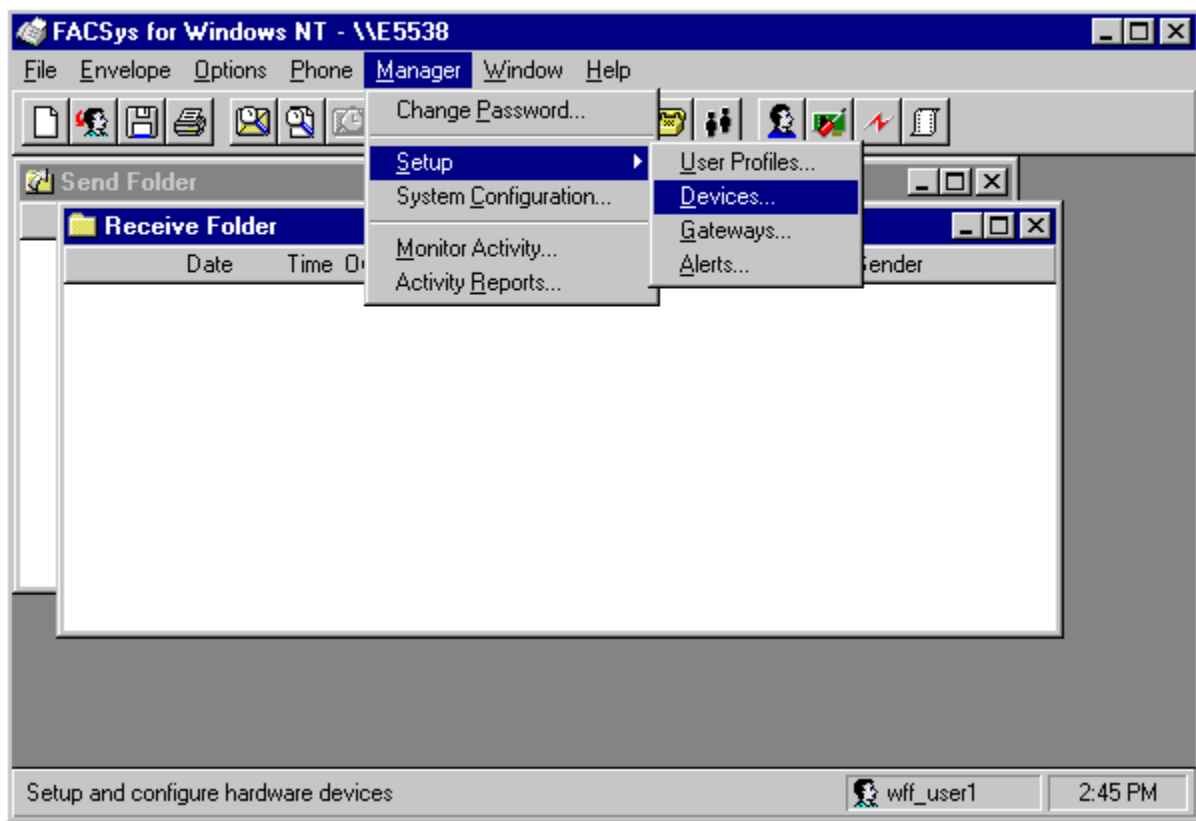
The fax server supports up to 16 lines; therefore, you may have several fax cards installed in the fax server. You will select one driver for each fax card. Each fax card might support multiple channels or ports, depending on the card's model and type. You configure each channel separately.

When you configure the drivers, you will configure the Call Subscriber ID (CSID) number, device mode, and modem parameters for each port as well as the board settings for each board.

To install and configure your fax card drivers, perform the following steps.

Fax Card Driver Installation

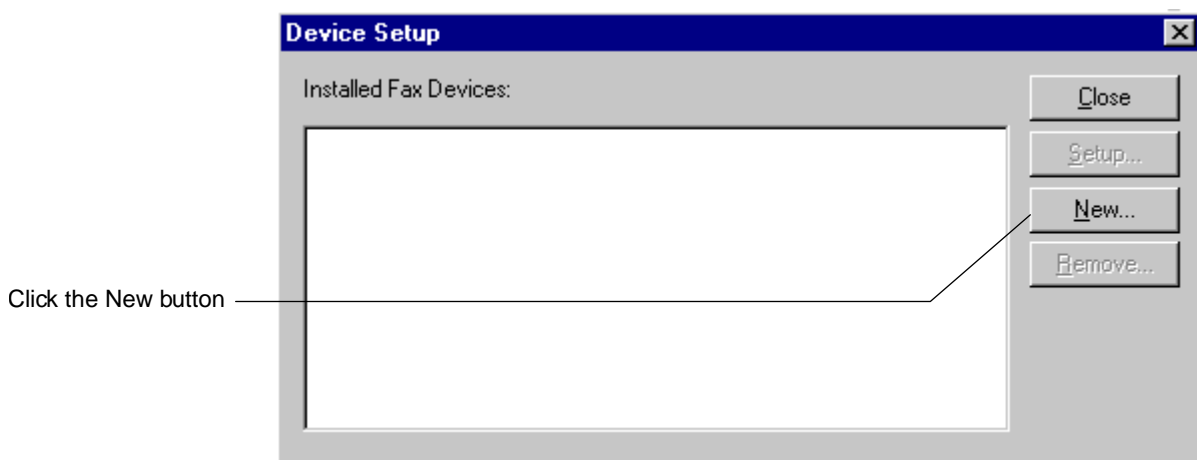
- 1 From the main FACSys for Windows NT application window, select the Manager menu, then Setup and Devices.



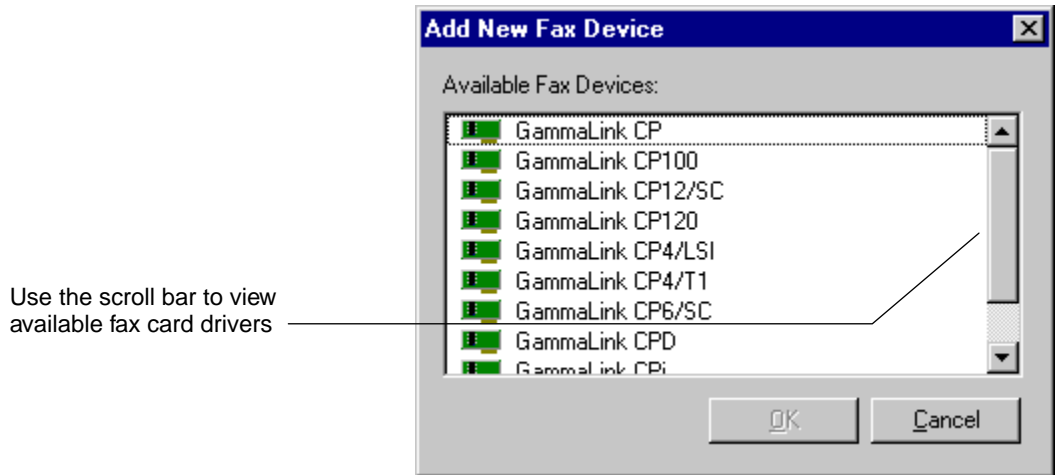
The Device Setup dialog box displays.

Because no fax drivers are installed in an initial installation, the Installed Fax Devices list box is empty.

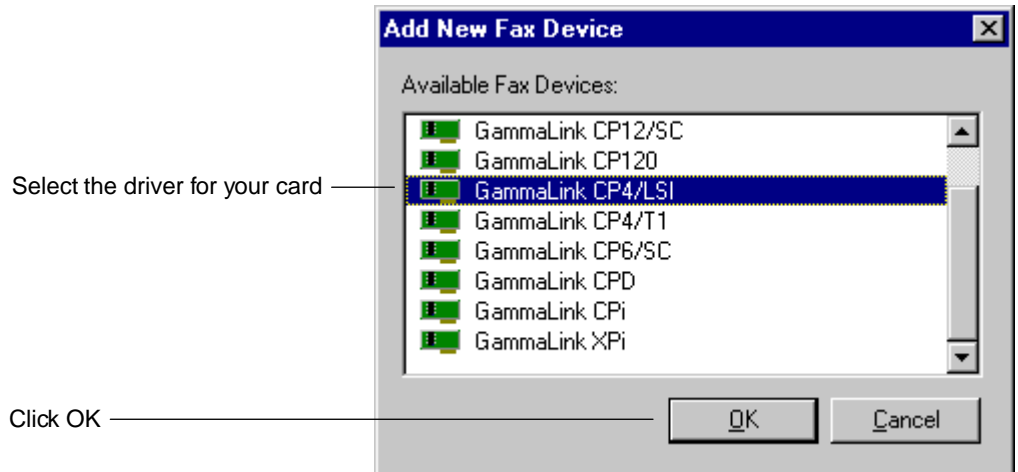
- 2 Click the New button.



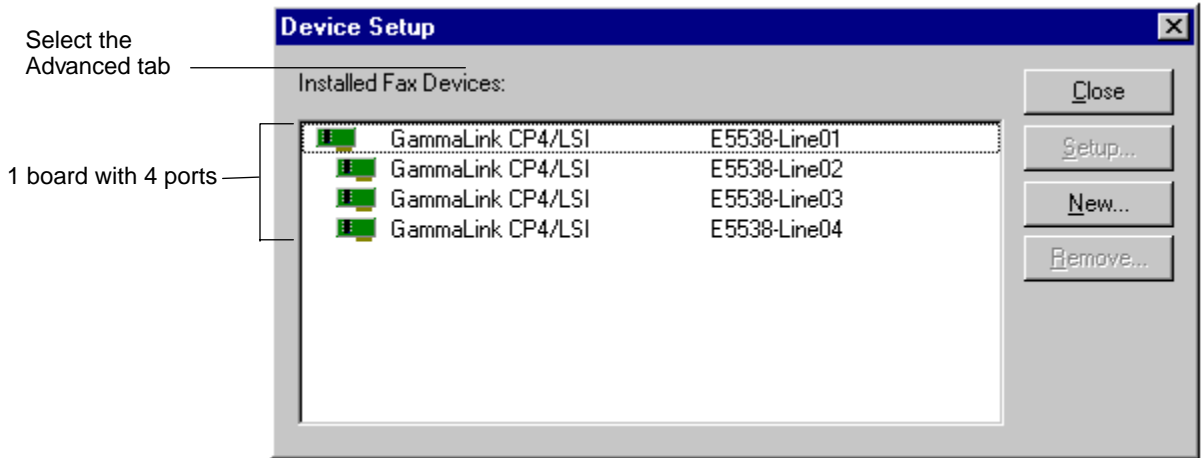
- 3 The Add New Fax Device dialog box displays.

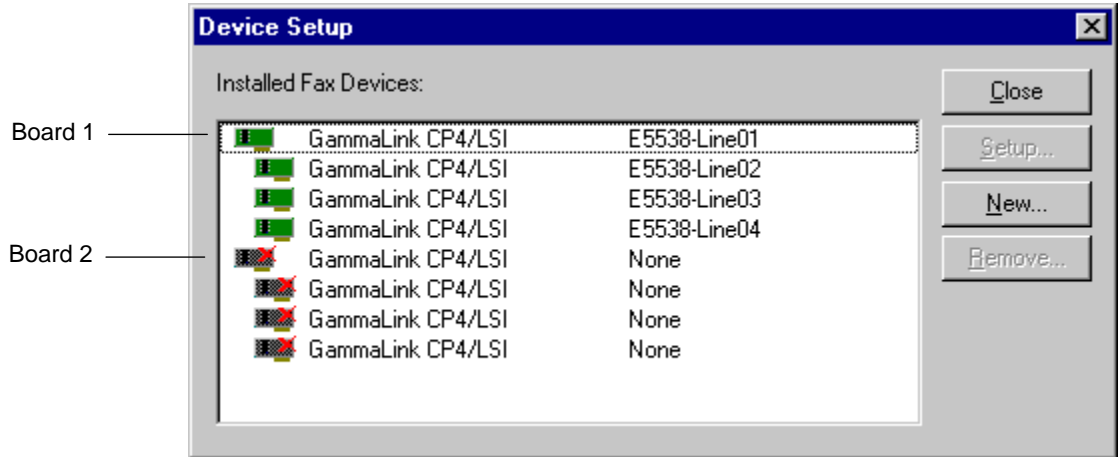


- 4 Select the driver that supports your fax card, then click OK.



When you select the driver for your fax card, the Device Setup dialog box displays. The selected driver displays in the Installed Fax Devices list box.





5 Proceed with the installation procedure, according to your requirements:

- If you have additional fax cards installed in your PC, repeat [Step 2 on page 119](#) to [Step 4 on page 120](#) to add drivers for the other cards until each card has a matching driver installed.

If you are adding additional fax drivers, only the boards in the same fax card family display in the list. You cannot mingle fax cards from different manufacturers in a Panagon Fax server running Optus FACSys. By default, all new fax devices are off-line (indicated by an X through their icons), and their CSIDs (located in the column to the right of the fax device name) are not defined.

- If you have no additional fax cards, this step completes the installation procedure, and you can now go to [Step 6 on page 123](#) to start the configuration procedure.

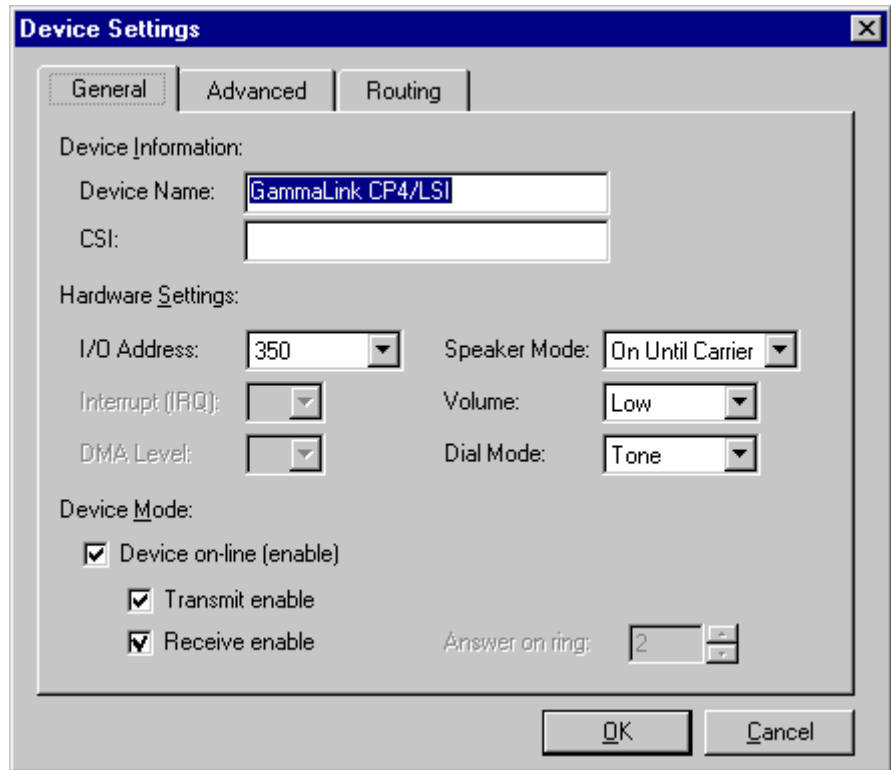
Fax Card Driver Configuration

- 6 You now must configure each fax device. For boards that support multiple channels, you must configure each channel separately.
 - a Select a fax device to configure by either:
 - Double-clicking a fax device, or
 - Selecting a device so it is highlighted, then clicking the Setup button.

The Device Settings dialog box displays.

- 7 The Device Settings dialog box contains three tabs: General, Advanced, and Routing. The General tab is active by default.
 - To configure device settings, use the General and Advanced tabs.
 - To configure the Direct Inward Dial (DID) routing option, use the General and Advanced tabs. For more information on configuring the DID routing option, refer to the section [“Configuring DID Routing” on page 138](#).

- To configure the Dual Tone Multiple Frequency (DTMF) routing option, use the Advanced and Routing tabs. For more information on configuring the DTMF routing option, refer to the section [“Configuring DTMF Routing” on page 144](#).



The following procedures describe fields you must complete in the General and Advanced tabs to configure the appropriate device settings.

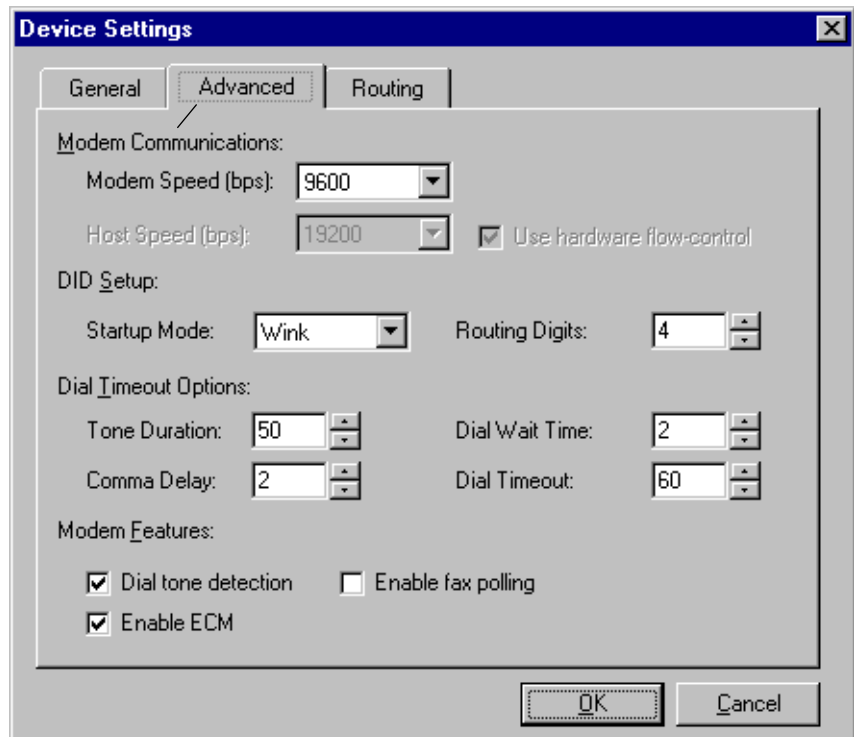
- 8 Each field in the General tab is described in the following table. Only the fields that pertain to the fax card are configurable; therefore, there may be some fields that do not apply to your card. For details on your particular card, consult the documentation provided by the fax card manufacturer.

Field Name	Action
Device Information	
Device Name	Enter a name that describes the fax device. The manufacturer's driver name appears by default. On multi-channel cards, you may want to indicate which channel the device represents. You can enter a maximum of 47 characters.
CSI	Enter the call subscriber ID (CSI) assigned to the fax device you are configuring. You can use any combination of up to 20 alphanumeric characters. The CSI is usually the telephone number to which the fax device is connected. After you configure the fax card, the CSI displays in the column to the right of the fax card name on the Device Setup dialog box.
Hardware Settings	
I/O Address	Select the I/O address from the drop-down list box that the fax device uses to communicate. The default value is the address that the system detects for each card. For your specific address, refer to your fax card manufacturer's documentation.
Interrupt (IRQ)	Select the interrupt number the fax device uses from the drop-down list box.
DMA Level	Select the DMA channel the fax device uses from the drop-down list box.

Field Name	Action
Speaker Mode	<p>Select an option from the drop-down list box to configure the fax device's speaker. There are three options:</p> <p>Always OffThe speaker is always off.</p> <p>On Until CarrierYou hear a tone until a connection is established. This option is the default.</p> <p>Always OnThe speaker is always on.</p>
Volume	<p>Select an option from the drop-down list box to set the device's speaker volume to low or high. The default is low.</p>
Dial Mode	<p>Select an option from the drop-down list box to set the device's dial mode to tone or pulse. This setting must match the configuration of the device at the other end of the fax link. The default is tone.</p>
Device Mode	
Device on-line (enable)	<p>Enable this option to configure the device to send and/or receive faxes. You must also enable either or both the Transmit enable and/or Receive enable option(s).</p>
Transmit enable	<p>Enable this option to configure the device to transmit faxes. You must also have enabled the Device on-line option.</p> <p>By default, the Transmit enable option is enabled when you enable the Device on-line (enable) option.</p>
Receive enable	<p>Enable this option to configure the device to receive faxes. You must also have enabled the Device on-line (enable) option.</p> <p>By default, the Receive enable option is enabled when you enable the Device on-line (enable) option.</p>

Field Name	Action
Answer on ring	<p>Select the number of times you want the telephone to ring before the fax device answers the call.</p> <p>The default is 2 rings. The range is 0 through 16. If you set this parameter to 0, the receive mode is disabled and the device does not answer.</p>

- 9 When you are satisfied with the settings in the General tab, select the Advanced tab.



- 10 Each field in the Advanced tab is described in the following table. Only the fields that pertain to the fax card are configurable; therefore, there may be some fields that do not apply to your card. For details on your particular card, consult the documentation provided by the fax card manufacturer.

Field Name	Action
Modem Communications	
Modem Speed	Choose the modem speed (in bits per second) that the fax card uses from the drop-down list box. This is the speed used to transmit faxes. The default and the maximum value allowed is 9600 bps. To determine the speed your fax card supports, consult the fax card manufacturer's documentation.
Host Speed	If your fax card has a serial modem, select the speed (in bps) that the PC uses to communicate with the fax board. The Host Speed must be set to twice the Modem Speed value.
Use Hardware Flow Control	If your fax card has a serial modem, enable this option to instruct the card to use hardware flow control (no transmission until the Clear to Send signal is received).
DID Setup	
Startup Mode (aka Trading Signal)	If you are using the DID routing option, refer to the section " Configuring DID Routing " on page 138 for information about this field.

4 Installing the Network Fax Server Software

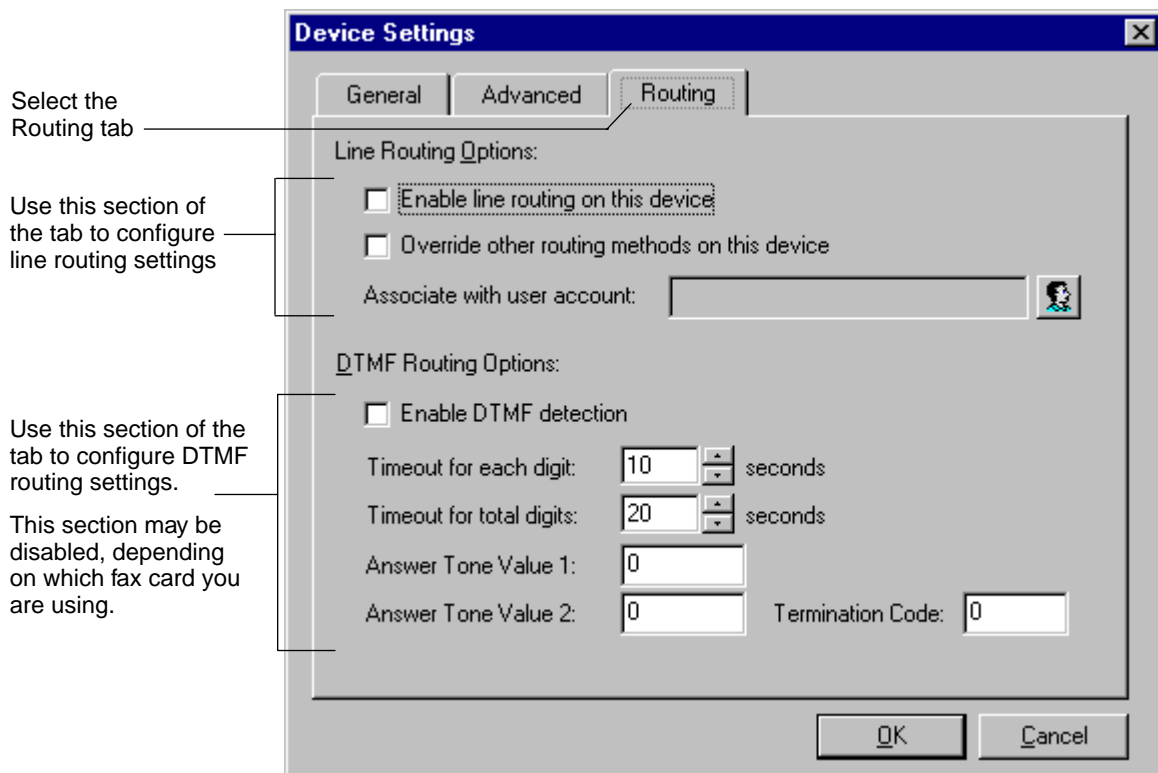
Installing and Configuring the Fax Card Drivers

Field Name	Action
Routing Digits	If you are using the DID routing option, refer to the section “Configuring DID Routing” on page 138 for information about this field.
Tone Duration	Select or enter the number of milliseconds indicating the duration of the tone. The default is 50 milliseconds.
Comma Delay	Select or enter the number of seconds that the fax device waits when a comma is detected in a dial string. A comma indicates a pause in the dial string, as, for example, when you have to wait for a second dial tone after dialing 9 on some phone systems. The default is 2 seconds.
Dial Wait Time	Select or enter the number of seconds the fax device waits to receive a dial tone before dialing. The Dial Tone Detection option must be enabled. The default is 2 seconds.
Dial Timeout	Select or enter the number of seconds the fax device waits to receive a carrier signal from the remote device. By default the device waits 60 seconds for an answer tone. If there is no response, the FACSys software hangs up. Note that international calls may require longer wait times.

Field Name	Action
Modem Features	
Dial Tone Detection	<p>Enable (check) this checkbox to have the fax device wait for a dial tone before dialing. The amount of time the device waits for a dial tone is determined by the Dial Wait Time option.</p> <p>The Dial Tone Detection checkbox is enabled (checked) by default.</p>
Enable ECM	<p>Enable (check) this checkbox to use Error Correction Mode (ECM) to validate data transmissions (i.e., check the fax for errors and then correct these errors during transmission).</p> <p>The Enable ECM checkbox is enabled (checked) by default.</p>
Enable Fax Polling	<p>Enable (check) this checkbox to permit the fax device to send a fax in response to a call from a remote device.</p> <p>The Enable Fax Polling checkbox is disabled (i.e., not checked) by default.</p>

- 11** Proceed with the configuration procedure, depending on what you want to configure. The next tab, Routing, is used for configuring Line routing settings and DTMF routing settings.
- To see a screen sample and general field definitions of the Routing tab, go to [Step 12 on page 132](#).

- To configure Line routing settings using the Routing tab, go to the section [“Configuring Line \(Channel\) Routing” on page 155](#) to continue with the configuration process.
- To configure DTMF routing settings using the Routing tab, go to the section [“Configuring DTMF Routing” on page 144](#) to continue with the configuration process.
- If you have completed entering device configuration settings, perform the following steps:
 - Click OK in the Device Settings dialog box to save the settings. The Device Settings dialog box closes, and the Device Setup dialog box displays.
 - Go to [Step 14 on page 134](#) to complete the device settings configuration process.



12 Fields in the Routing tab are used to either configure line routing or DTMF routing settings. For more details on specific fields in this Routing tab, refer to the following sections, according to your configuration requirements:

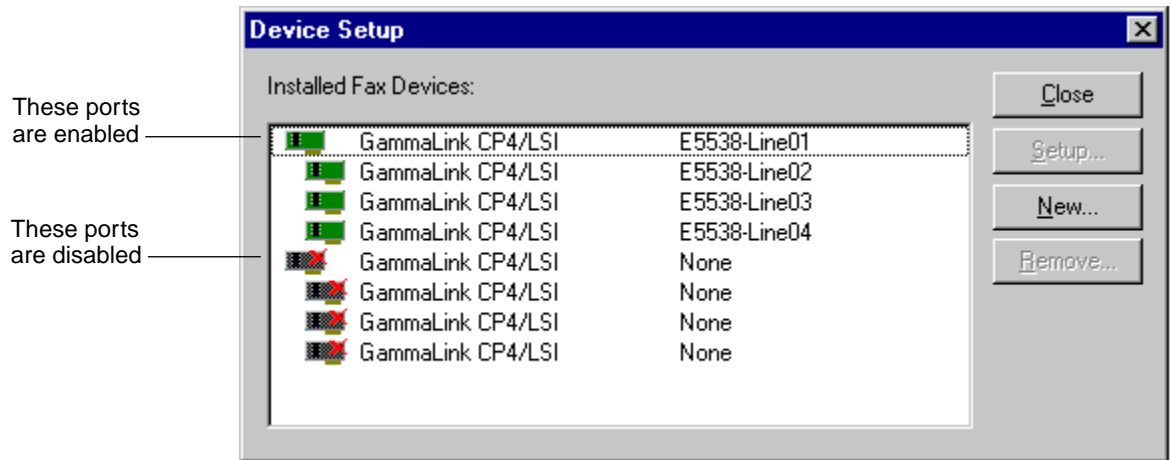
- To configure line routing settings, refer to the section [“Configuring Line \(Channel\) Routing”](#) on page 155.
- To configure DTMF routing settings, refer to the section [“Configuring DTMF Routing”](#) on page 144.

Each field in the Routing tab is described in the following table. Only the fields that pertain to the fax card are configurable; therefore, there may be some fields that do not apply to your card. For details on your particular card, consult the documentation provided by the fax card manufacturer.

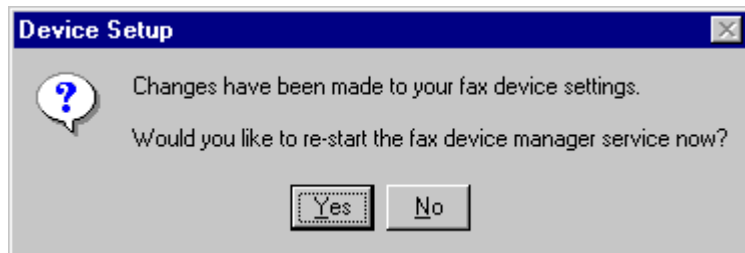
Field Name	Action
Line Routing Options	
Enable line routing on this device	<p>Enable this checkbox to route faxes to a specific user. You can enable line routing if all other routing options fail (e.g., enable line routing if a fax cannot be delivered according to DID, DTMF or CSI). This checkbox is disabled (i.e., not checked) by default.</p> <p>For information about configuring line routing, refer to the section “Configuring Line (Channel) Routing” on page 155.</p>
Override other routing methods on this device	<p>Enable this checkbox to override any other configured routing option for the selected device. This checkbox is disabled (i.e., not checked) by default.</p>
Associate with user account	<p>This field is initially blank. When you enable line routing on a device, you must associate a line with a specific user account.</p> <p>If you are using line (channel) routing and you want to associate a line with a specific user account, refer to the section “Configuring Line (Channel) Routing” on page 155.</p>

Field Name	Action
DTMF Routing Options	
Enable DTMF detection	If you are using DTMF routing, refer to the section “Configuring DTMF Routing” on page 144 for information about this field.
Timeout for total digits	If you are using DTMF routing, refer to the section “Configuring DTMF Routing” on page 144 for information about this field.
Answer Tone Value 1	If you are using DTMF routing, refer to the section “Configuring DTMF Routing” on page 144 for information about this field.
Answer Tone Value 2	If you are using DTMF routing, refer to the section “Configuring DTMF Routing” on page 144 for information about this field.
Termination Code	If you are using DTMF routing, refer to the section “Configuring DTMF Routing” on page 144 for information about this field.

- 13** When you are satisfied with the values in the previous tabs, click OK. The Device Settings dialog box closes, and the Device Setup dialog box displays.
- 14** In the Installed Fax Devices list box, the icons for configured fax devices are no longer marked with an X and the CSI, if assigned, displays in the listing.



- 15 After you configure all fax devices, click the Close button in the Device Setup dialog box. The following message displays.



- 16 Click the Yes button. The FACSys software restarts, and you are prompted to log in as a FACSys user again.

Configuring an Incoming Fax Routing Option

If you will be using the inbound fax facility, you must choose a routing option to route incoming FileNET faxes to the Panagon Fax FACSys username. If you are not planning to use the inbound fax facility, skip to [“Installing the FACSys Client Software” on page 160.](#)

The following table lists all routing options. As part of the routing process, the Network Fax Server looks in each inbound fax for each of the routing options in the order shown below. Then it routes the fax to the user based on the first routing element it identifies.

Routing Option	Description
DID	If the customer's telephone service supports Direct Inward Dial (DID), the Network Fax Server can use from 1 to 15 digits of the called phone number to route a fax to a user. DID can also be used for indexing information.
DTMF	If the customer's telephone service supports Dual Tone Multiple Frequency (DTMF), the fax sender can enter a configurable number of digits at the fax machine -- usually a four-digit extension. The Network Fax Server will use the DTMF data to route the fax to a specific document class or can save the DTMF data for automatic indexing information.
CSID	The Network Fax Server can route an inbound fax to a user based on the Call Subscriber ID (CSID) of the incoming call. The Call Subscriber ID is the fax header field from the sending fax machine.

4 Installing the Network Fax Server Software

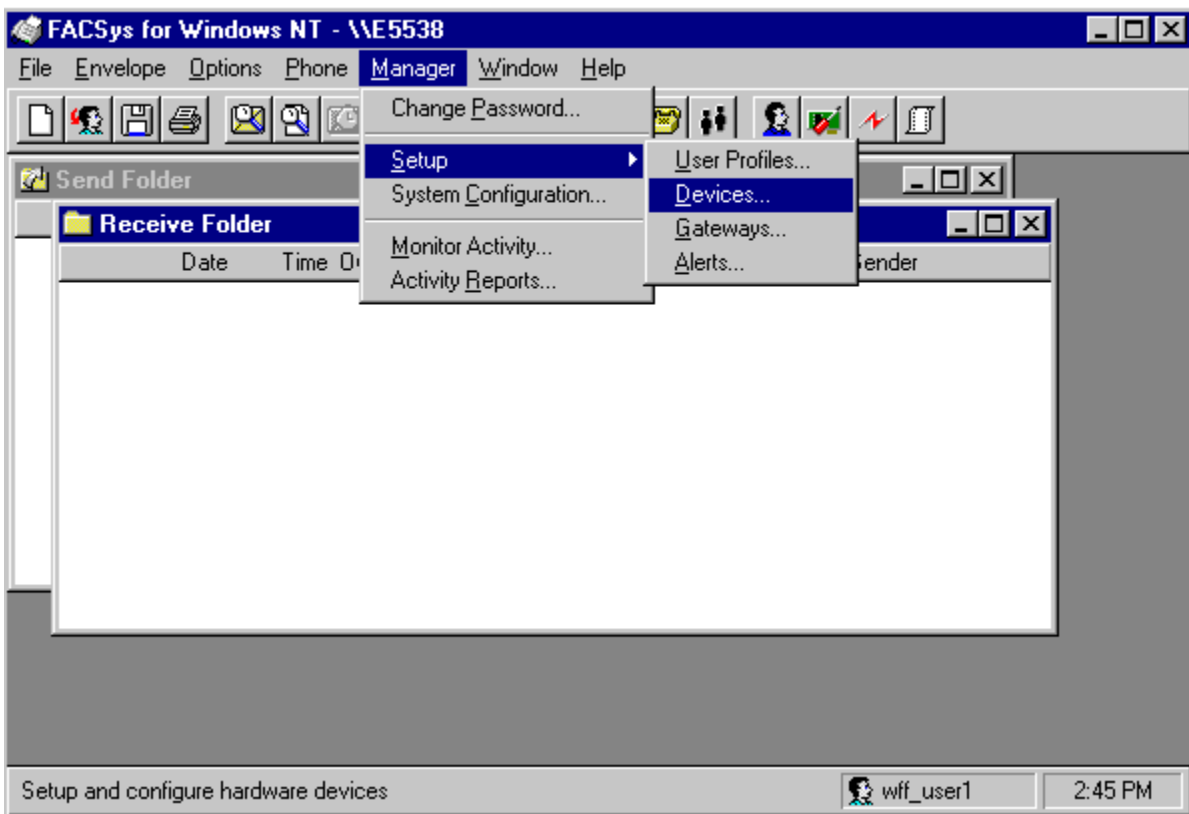
Configuring an Incoming Fax Routing Option

Caller ID (or ANI)	<p>Caller ID (ANI) functionality will be officially qualified at a later date. Until it is officially qualified, Caller ID will be classified as a configurable feature and will not be supported. Refer to the following location on FileNET's Web site for official qualification support notification:</p> <p>http://www.css.filenet.com/documentation/index.html</p> <p>Panagon Fax uses Caller ID to capture the telephone number of the sending fax machine. The sending fax number can be used as indexing information and will route the inbound fax to the appropriate Document Class.</p>
Line (Channel) Routing	<p>You can configure the Network Fax Server software to route all faxes coming in on a specific fax card port (such as port 3) to a specific user/document class on the IDMIS.</p>
Manual Routing by the Network Fax Server Administrator	<p>If none of the elements previously described determines the inbound fax's destination, the fax is routed to the Network Fax Server administrator, who can forward the fax to its intended recipient.</p>

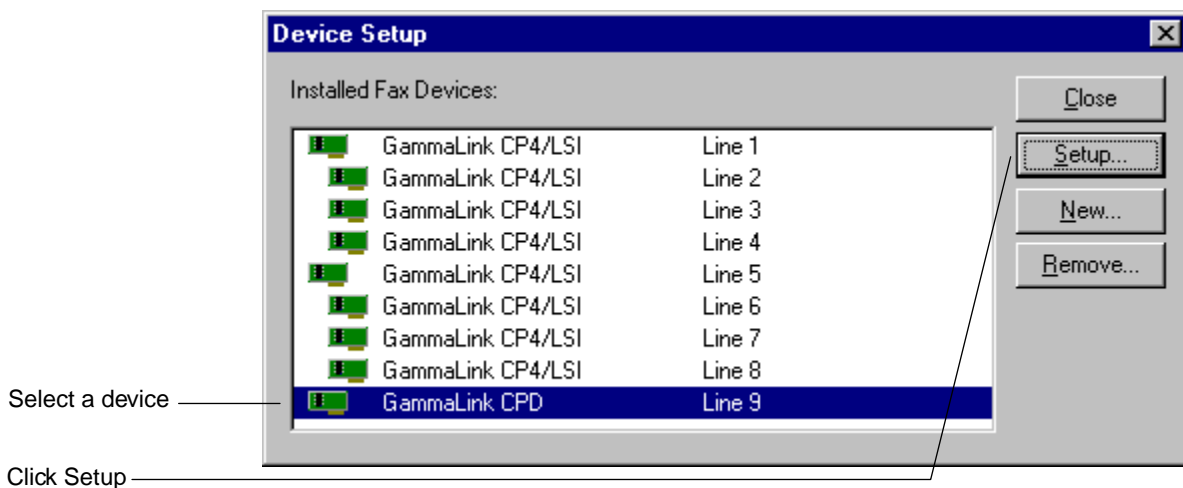
Configuring DID Routing

To configure the DID routing option, perform the following steps.

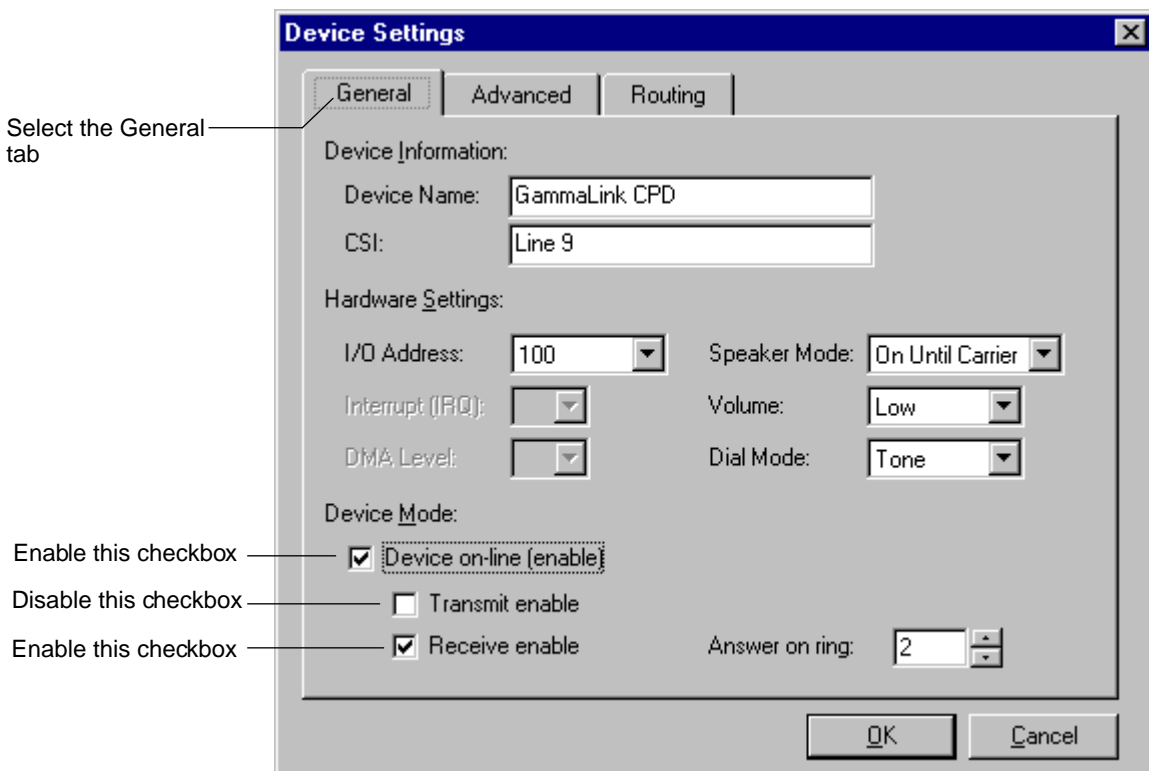
- 1 On the FacSys for Windows NT main application window, select the Manager menu. Then choose Setup and Devices.



The Device Setup dialog box displays.



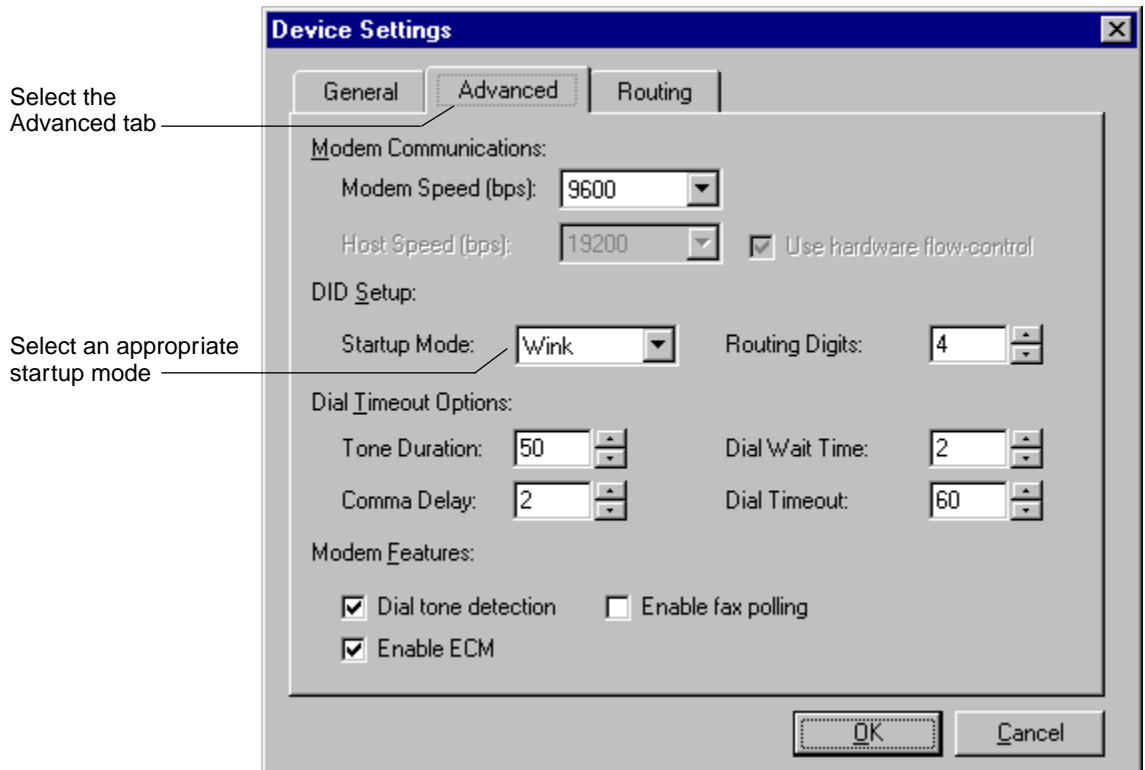
- 2 From the Installed Fax Devices list box, select the fax device you want to configure, then click the Setup button. The Device Settings dialog box displays.



- 3 Select the General tab.
- 4 Enable (check) the Device on-line (enable) checkbox. An online device can transmit faxes, receive faxes, or do both. If you do not enable the device, it will not receive or send faxes.

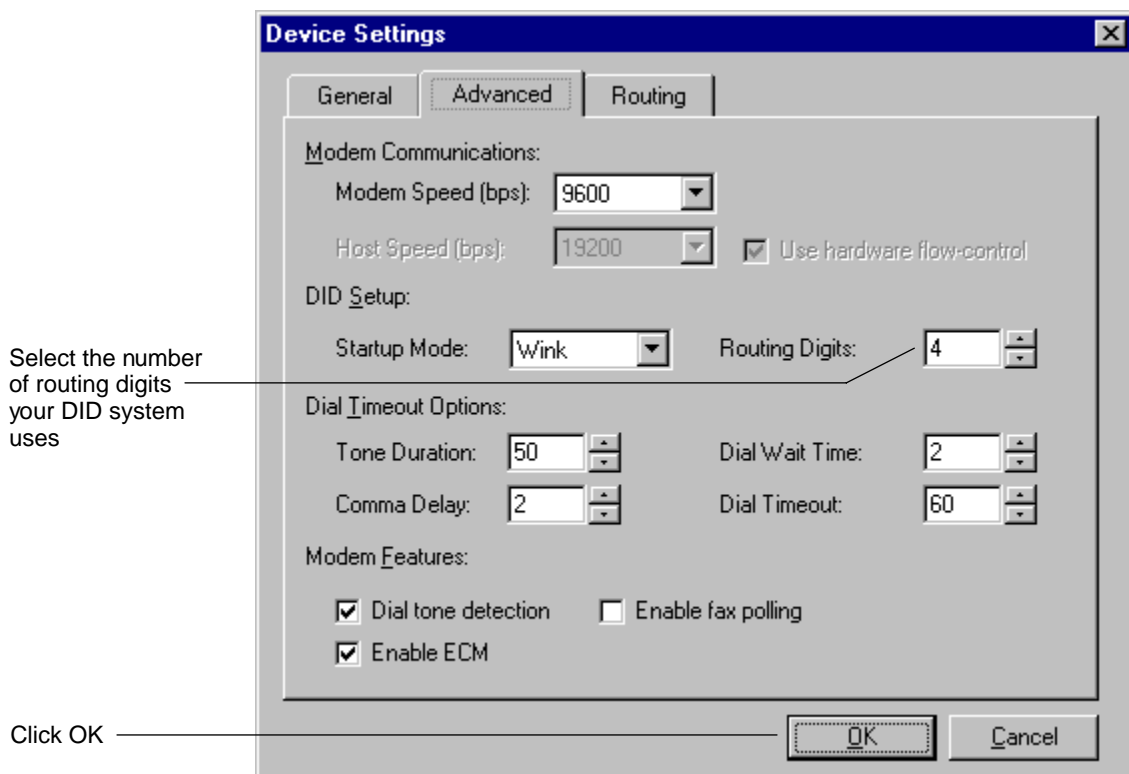
By enabling the Device on-line (enable) checkbox, the Transmit enable and Receive enable checkboxes become highlighted. (These checkboxes are inactive prior to enabling the Device on-line (enable) checkbox.)

- 5 By default, the Transmit enable checkbox is enabled. Disable (remove the check from) this checkbox.
- 6 By default, the Receive enable checkbox is enabled (checked). Leave this checkbox enabled. Enabling this checkbox configures the device to receive faxes.
- 7 Select the Advanced tab.



- 8 In the Startup Mode field (aka trading signal), select the startup mode that the fax card uses from the drop-down list box. The startup mode is the start sequence signal indicating the connection online.

Startup mode options vary by fax card manufacturer. If you are using the Gamma Fax card, this card only supports the Wink option. For more information on selecting the appropriate option your card supports, refer to your fax card documentation.



- 9** In the Routing Digits field, select or enter the number of routing digits your DID system uses. This number must match the number provided by the telephone company's central office; otherwise, the incoming call will fail. The maximum number allowed is 15.

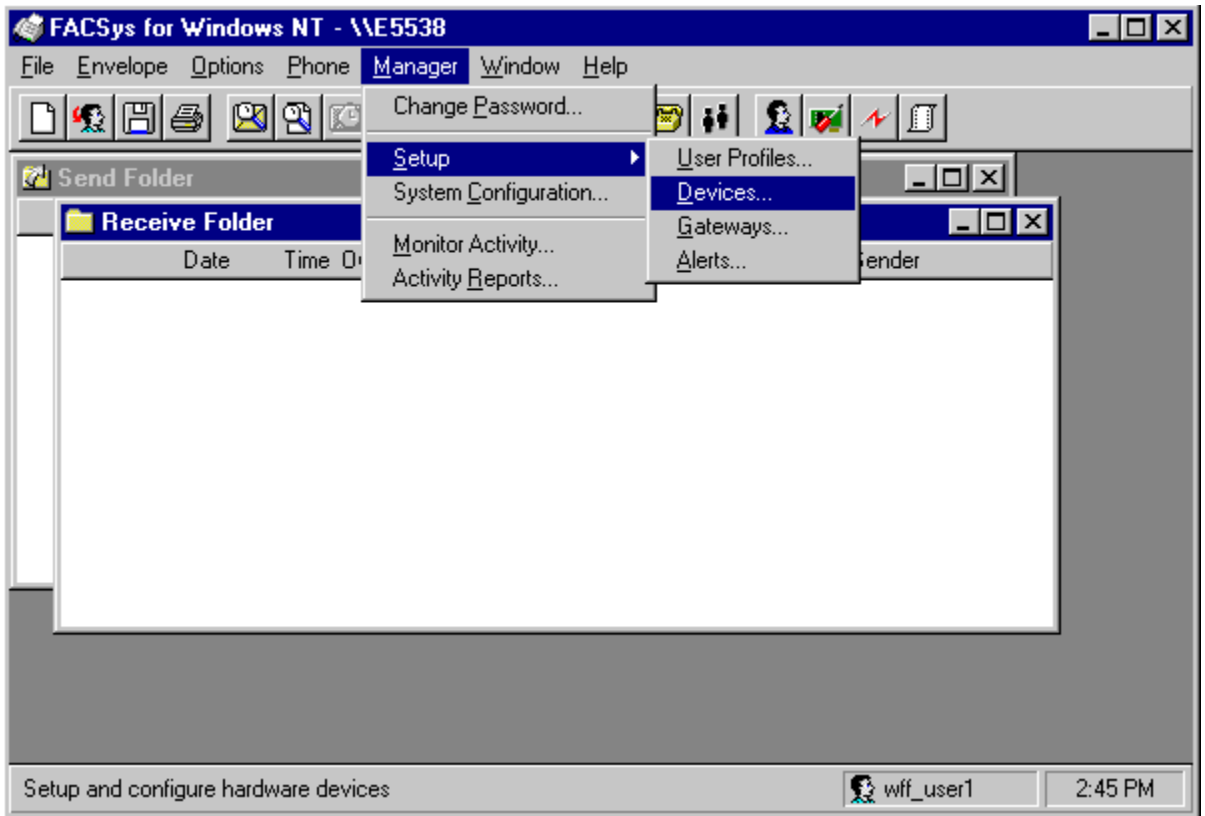
The number you select in this field determines the length of the following values:

- Router IDs you can enter in the User Profile dialog box
 - DID value in the Inbound Properties Database file
- 10** Click OK to accept the settings and close the Device Settings dialog box. The Device Setup dialog box displays again.
- 11** Click Close in the Device Setup dialog box to close the dialog box and return to the FacSys for Windows NT main application window.

Configuring DTMF Routing

To configure the DTMF routing option, perform the following steps.

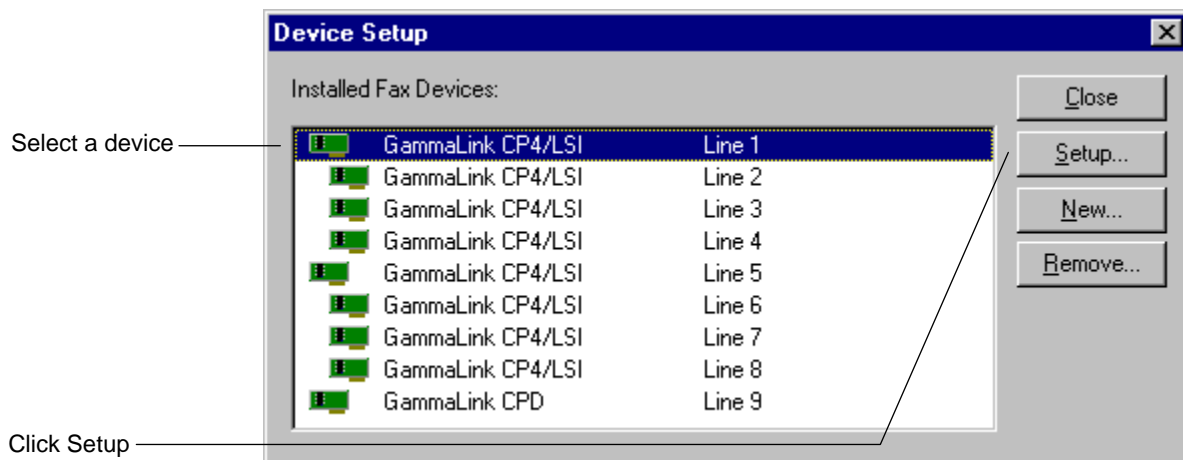
- 1 On the FacSys for Windows NT main application window, select the Manager menu. Then choose Setup and Devices.



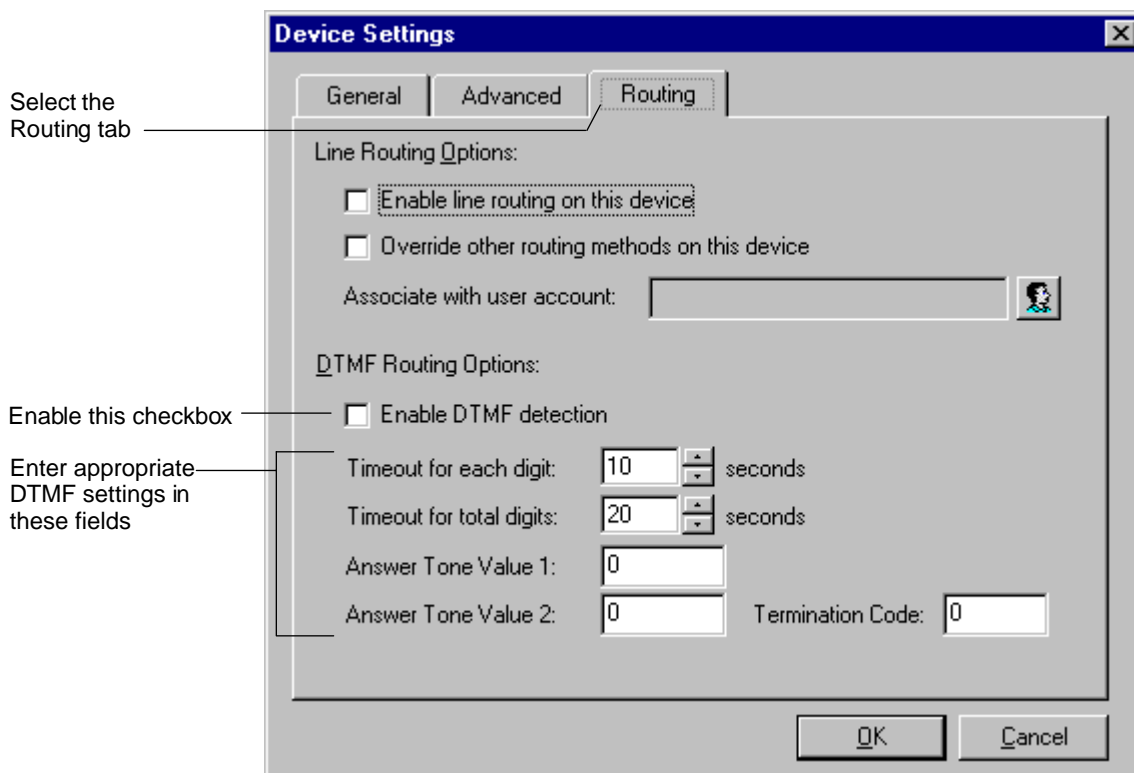
The Device Setup dialog box displays.

4 Installing the Network Fax Server Software

Configuring an Incoming Fax Routing Option



- 2 From the Installed Fax Devices list box, select the fax device you want to configure, then click the Setup button. The Device Settings dialog box displays.
- 3 Select the Routing tab.



- 4 Enable (check) the checkbox “Enable DTMF detection” to allow the board to attempt DTMF detection during call reception.
This checkbox is disabled (i.e., not checked) by default.
- 5 In the Timeout for each digit field, select or enter the number of seconds indicating the timeout period during which each digit must be entered. This number defines the interval between the DTMF tones. The default is 5 seconds.

- 6** In the Timeout for total digits field, select or enter the number of seconds indicating the timeout period during which all digits must be entered. The default is 20 seconds.
- 7** In the Answer Tone Value 1 field, enter a number for the duration of the DTMF input prompting tone in milliseconds.

The maximum number recommended is 1000 milliseconds (or 1 second). For all fax boards, the value 0 indicates no tone. The default is 0.

- 8** In the Answer Tone Value 2 field, enter a number for the pitch of the DTMF input prompting tone frequency in hertz (Hz). (One Hz is equal to one cycle per second.)

For all fax boards, the value 0 indicates no tone. The default is 0.

- 9** In the Termination Code field, enter a number that represents the termination code indicating that the input is finished. For the appropriate number to enter for your specific fax card, refer to your fax card's documentation.

The termination code sends a signal to the board indicating that input is finished. An example of a termination code is the “#” character sometimes used to terminate the input string of four digits.

- 10** Click OK to accept the settings and close the Device Settings dialog box. The Device Setup dialog box displays again.
- 11** Click Close in the Device Setup dialog box to close the dialog box and return to the FacSys for Windows NT main application window.

Configuring CSI Routing

To route all faxes received from a specific remote device to the Panagon Fax Network Fax Server user, you can enable and configure call subscriber ID (CSI) routing. CSI routing maps incoming faxes that contain a specified CSI to a Network Fax Server user.

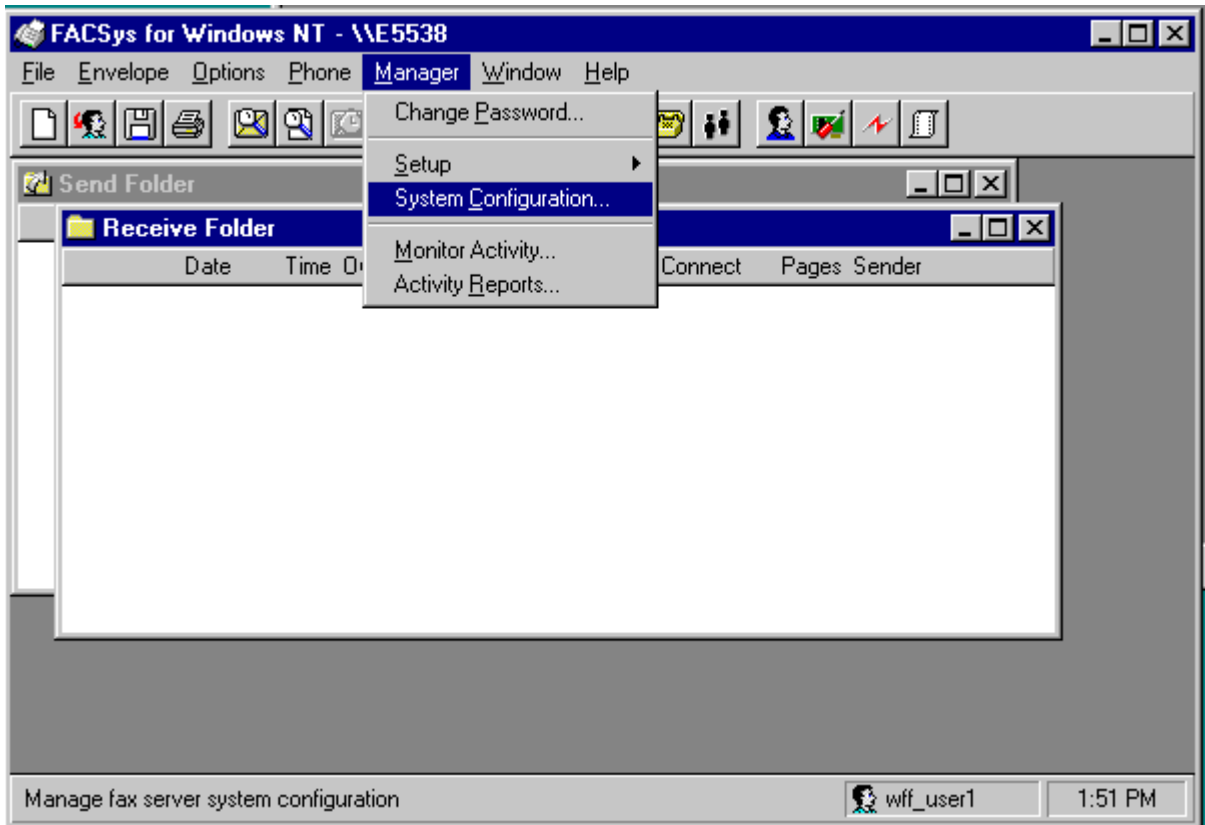
The Network Fax Server automatically builds a database of CSIs associated with each incoming call it receives. When you configure CSI routing, you map a user name to a CSI in the CSI database.

Every time the Network Fax Server receives an inbound fax that has a CSI, the Network Fax Server searches through its CSI Router Association list. All new CSIs are added to the list automatically by the fax server.

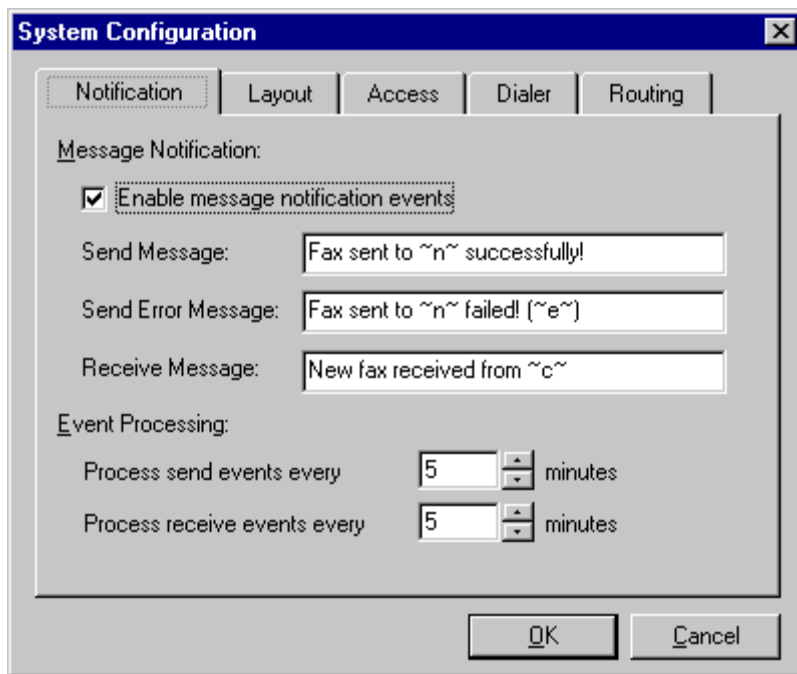
Using the System Configuration dialog box, you can associate a specific Network Fax Server user with a CSI. When the Network Fax Server detects an associated CSI and the Enable CSI Routing option is enabled, the Network Fax Server delivers the fax to the associated user automatically.

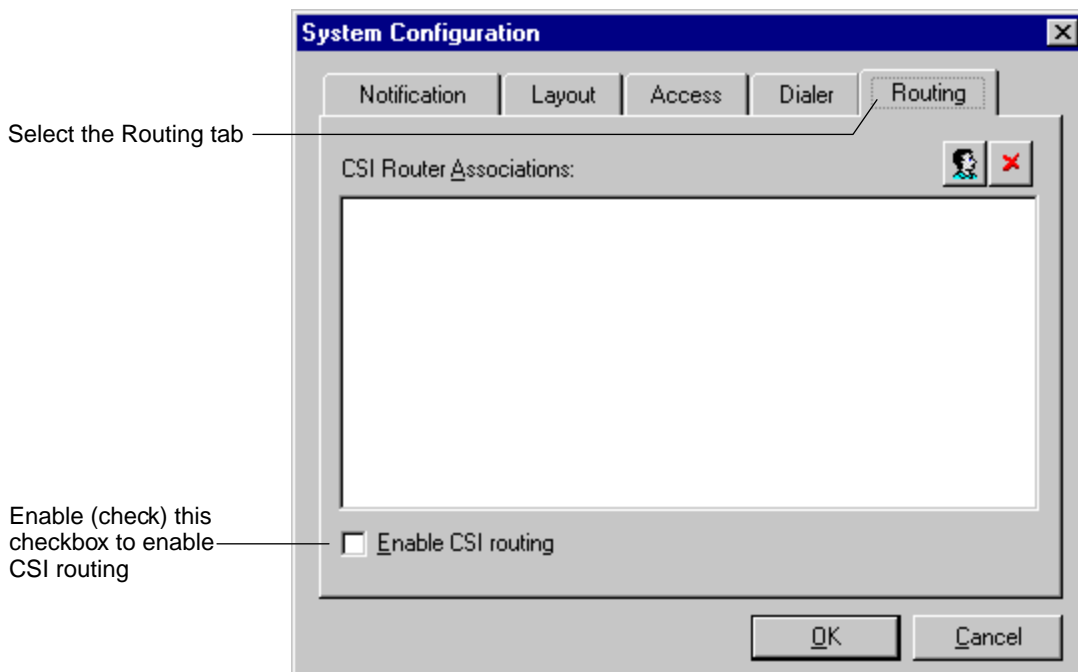
To configure CSI routing, perform the steps on the following pages.

- 1 From the FACSys for Windows NT main window, select the Manager menu, then choose System Configuration.



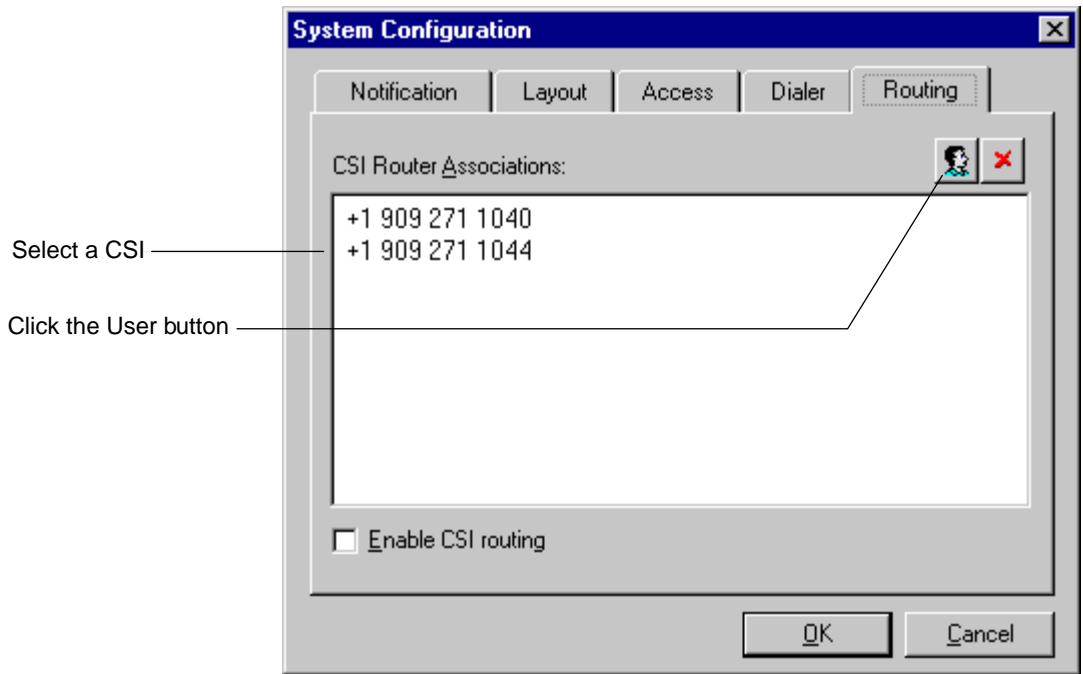
The System Configuration dialog box displays.






- 2 Select the Routing tab, which contains information about CSI router associations.
- 3 Enable (check) the Enable CSI routing checkbox.
- 4 To build the CSI table, have someone place a call to the Network Fax Server from each remote fax machine.

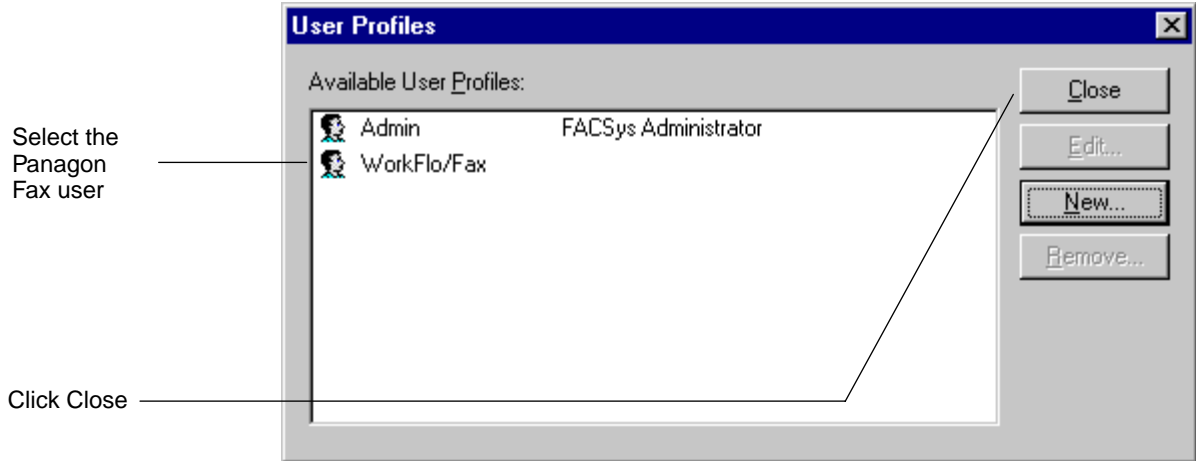
Incoming faxes are not routed through to a user (the Owner field in the Receive folder shows None), but each CSID displays in the CSI Router Associations list box, as shown in the following example.



5 To map the Panagon Fax user to a CSI, perform the following steps:

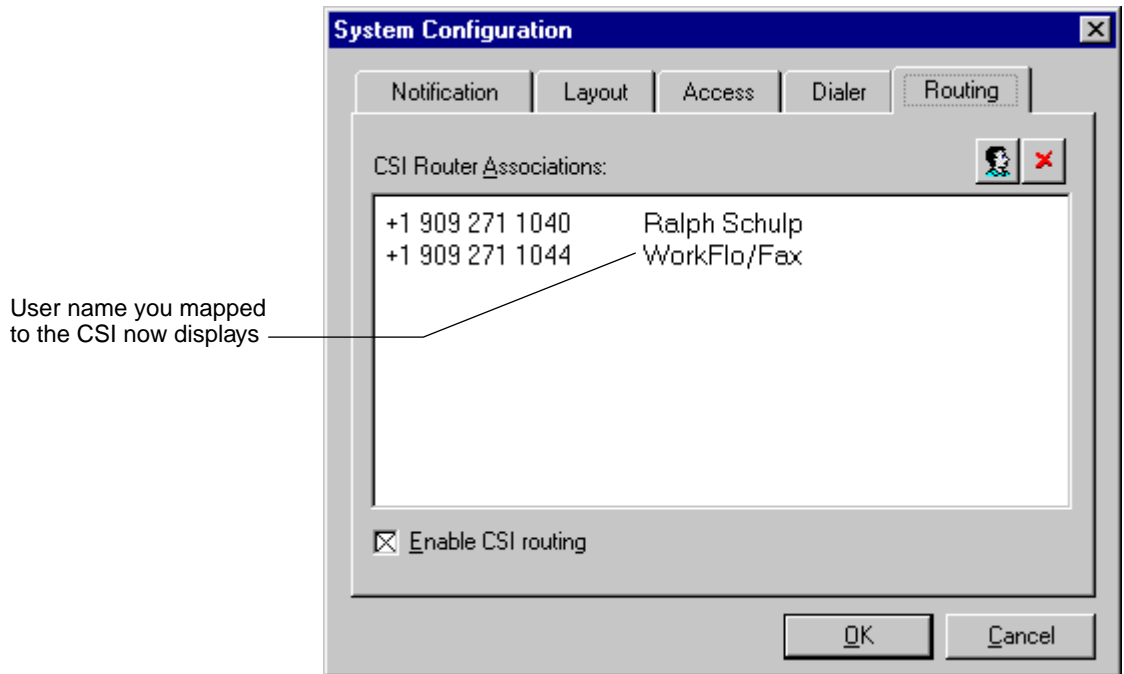
- a Select a CSI from the list box, and click the User button  .

The User Profiles dialog box displays with a list of all FACSys users.



- b In the Available User Profiles list box, select the Panagon Fax user.
- c Click Close to close the User Profiles dialog box and return to the Routing tab.
- d In the Routing tab, the user name you mapped to the CSI now displays in the CSI Router Associations list box and is now an associated CSI.

When FACSys detects an associated CSI and the Enable CSI routing checkbox is enabled (checked), FACSys delivers the fax to the associated user automatically.



Proceed as follows, depending on what you want to do:

- To map another Panagon Fax user to a CSI, go to [Step a on page 152](#) again.
- To delete a CSI from the CSI Router Associations list, go to [Step 6 on page 154](#).
- To close the System Configuration dialog box, go to [Step 7 on page 155](#).

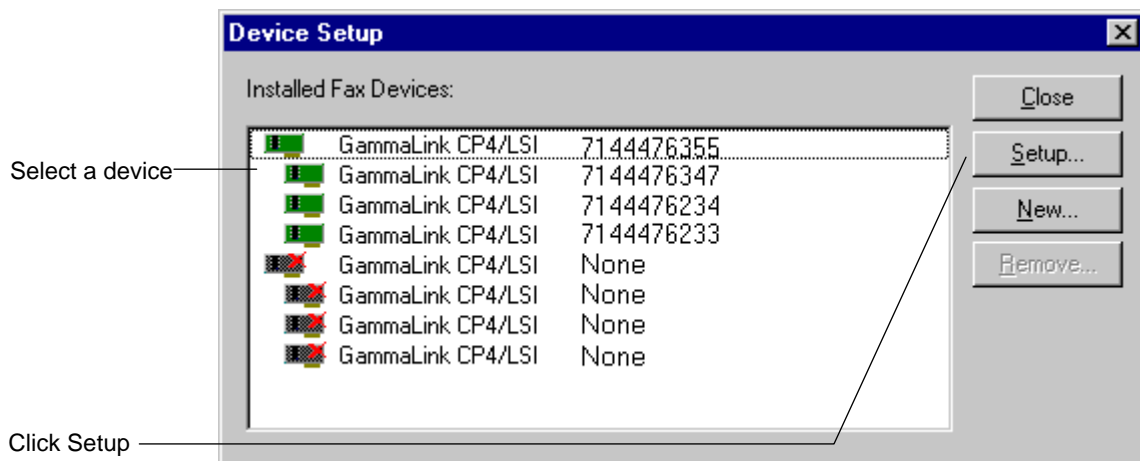
- 6 Highlight the CSI, and click the **X** button to delete a CSI from the list box.

- 7 Click OK to close the System Configuration dialog box, save your settings, and return to the FACSys for Windows NT main window.

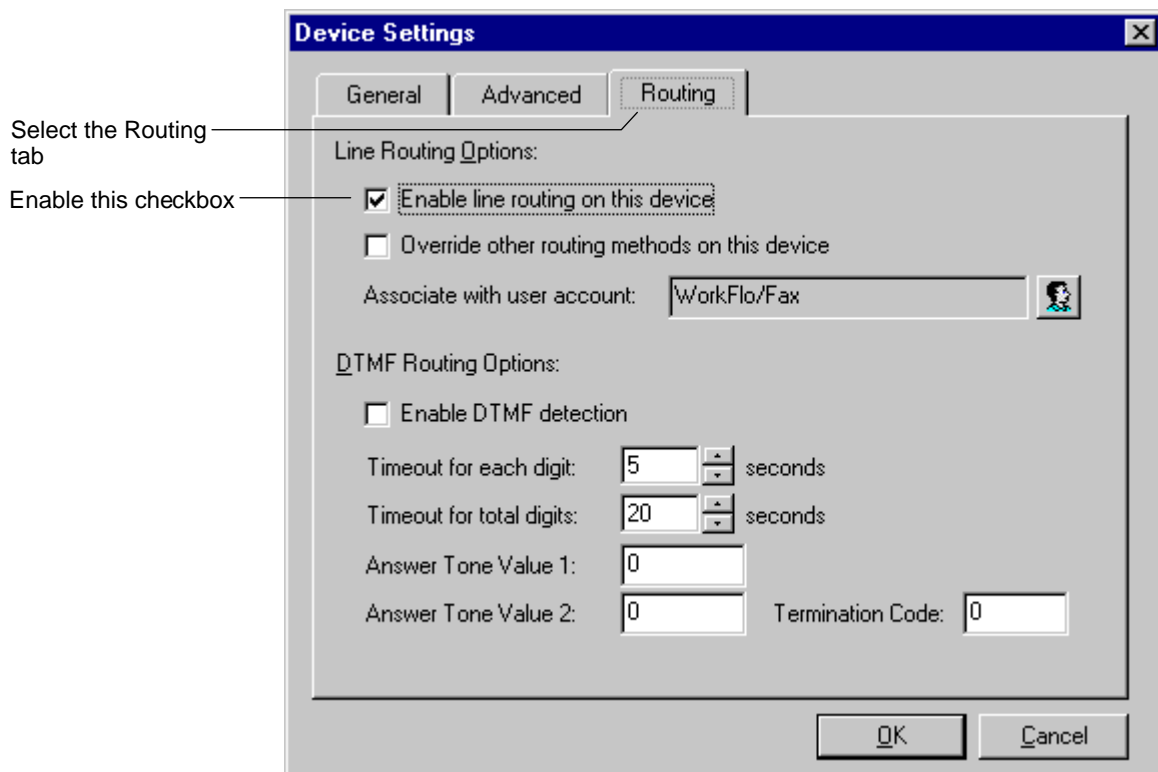
Configuring Line (Channel) Routing

Use the Line Routing option to route faxes to a specific user. Choose this option if all other routing options fail (e.g., enable line routing if a fax cannot be delivered according to DID, DTMF or CSI). To route all faxes received on a specific fax line to the Panagon Fax user, perform the following steps.

- 1 From the FACSys for Windows NT main application window, select the Manager menu, then choose Setup and Devices. The Device Setup dialog box displays.




- 2 From the Installed Fax Devices list box, select the fax device you want to configure, then click the Setup button. The Device Settings dialog box displays.

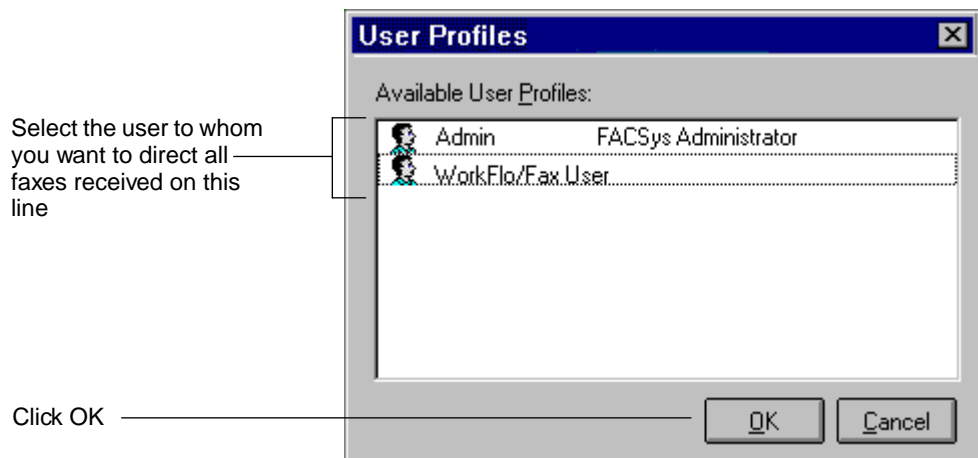


To associate the fax device with a user name, perform the following steps:

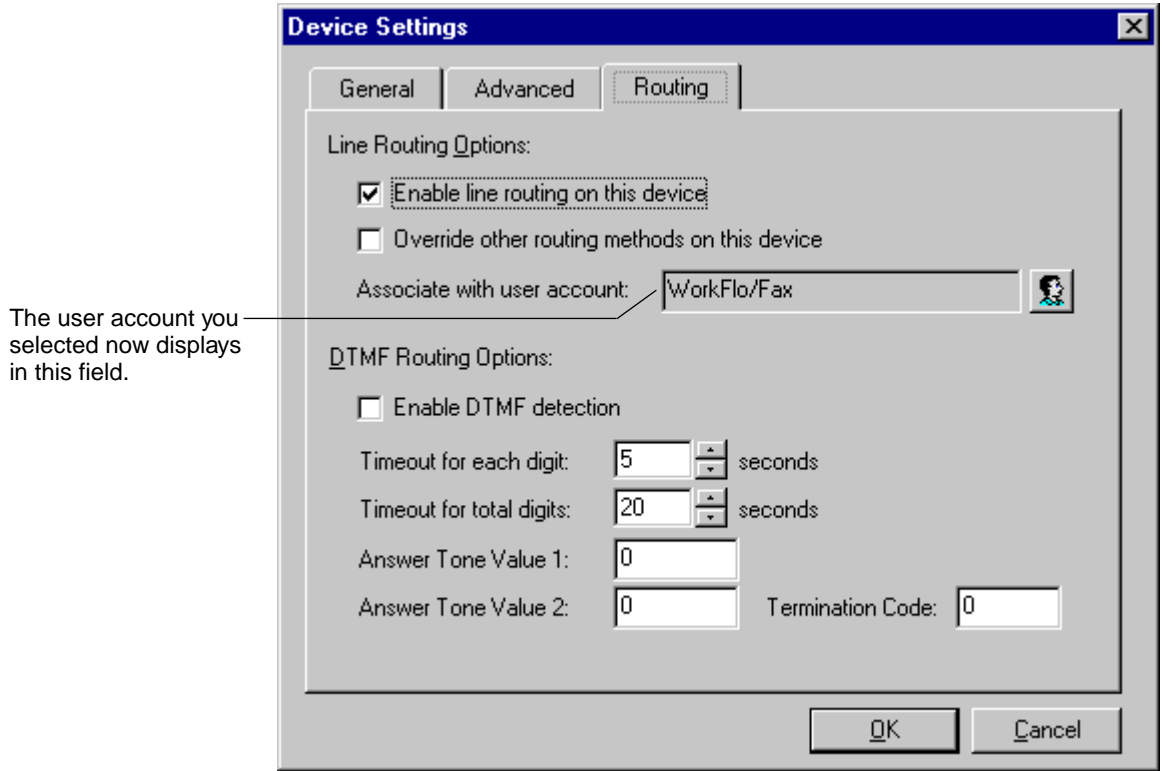
- a Select the Routing tab.
- b Enable (check) the "Enable line routing on this device" checkbox. This checkbox is disabled (i.e., not checked) by default.

- c Click the User button  to the right of the field “Associate with user account”. You must click this button to associate a line with a specific user account.

When you click the User button, the User Profiles dialog box displays.



- d From the list of available users, select the user to whom you want to direct all faxes received on this line.
- e Click OK to close the User Profiles dialog box and return to the Routing tab.



- f Note that the field “Associate with user account” that was initially blank now displays the user account name you selected. (In this example, it is the user account Panagon Fax.)

Note You can override any other configured routing mechanism, such as CSI routing for the selected device, by enabling (checking) the check-box “Override other routing methods on this device”.

- 3 Click OK to accept the settings and close the Device Settings dialog box. The Device Setup dialog box displays again.

- 4 Click Close in the Device Setup dialog box to close the dialog box and return to the FacSys for Windows NT main application window.

Manual Routing by the Administrator

Manual routing to the Network Fax system administrator occurs automatically if the Network Fax Server software cannot perform any of the routing methods described in the previous sections.

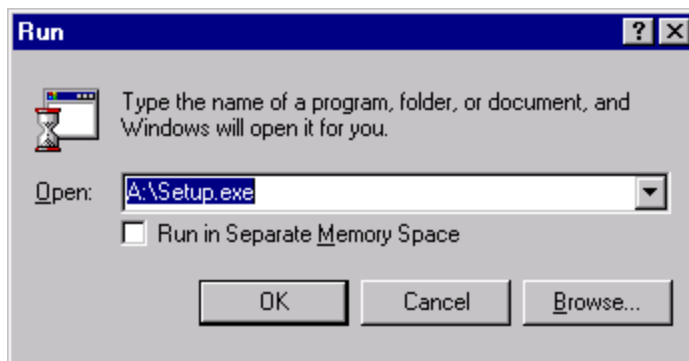
Installing the FACSys Client Software

Use the Setup utility on the FACSys Client diskettes to install the FACSys client software on the fax server. You will use the client software to test your FACSys installation and ensure that you can send and receive faxes.

- 1 Insert the Win32 Client License disk in your computer's floppy drive.
- 2 From the taskbar, click Start and select Run.
- 3 In the Open text box, type:

<x>:\Setup.exe

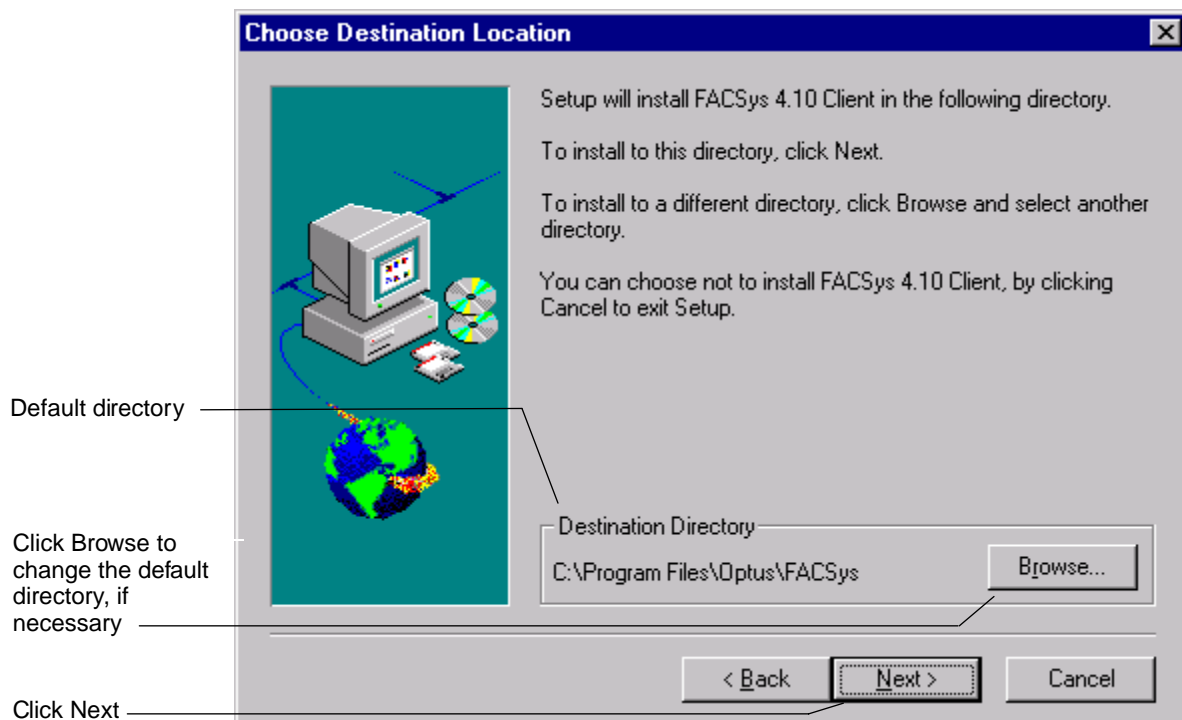
where <x> represents the drive letter mapped to the floppy drive in which you inserted the Win32 Client License disk.



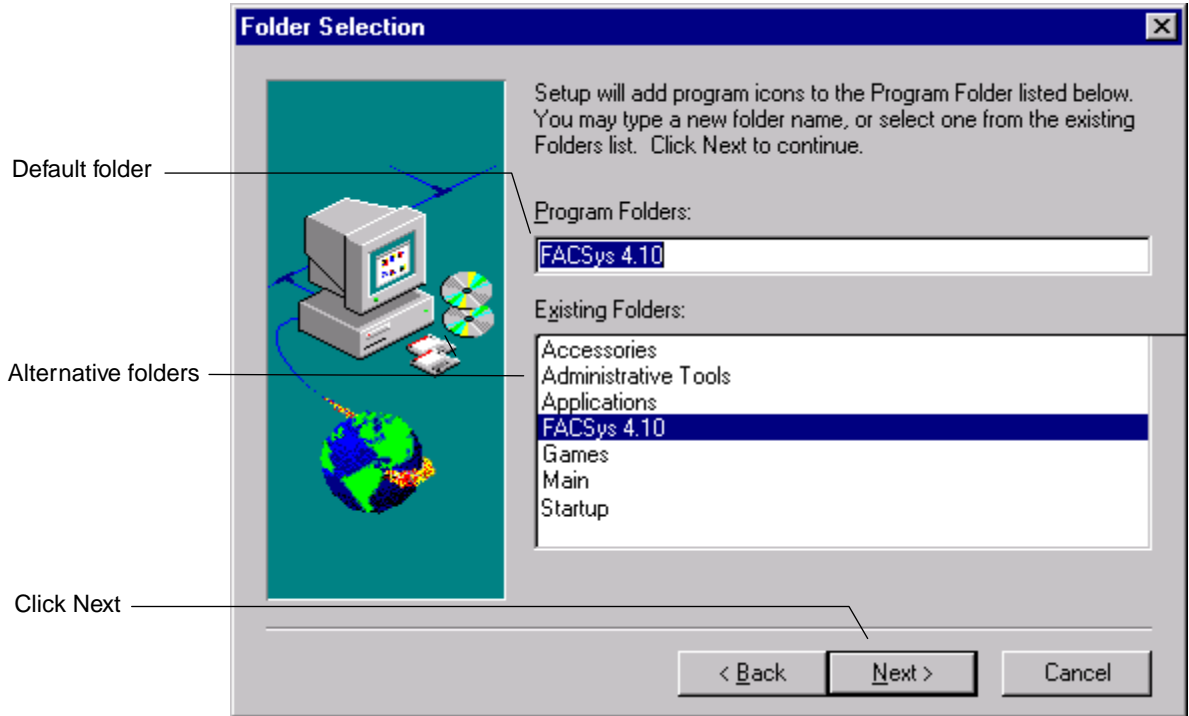
- 4 Click OK. The FACSys client setup wizard loads, and the Welcome screen displays.



- 5 On the Welcome screen, review the information displayed, then click the Next button. The Choose Destination Location screen displays.

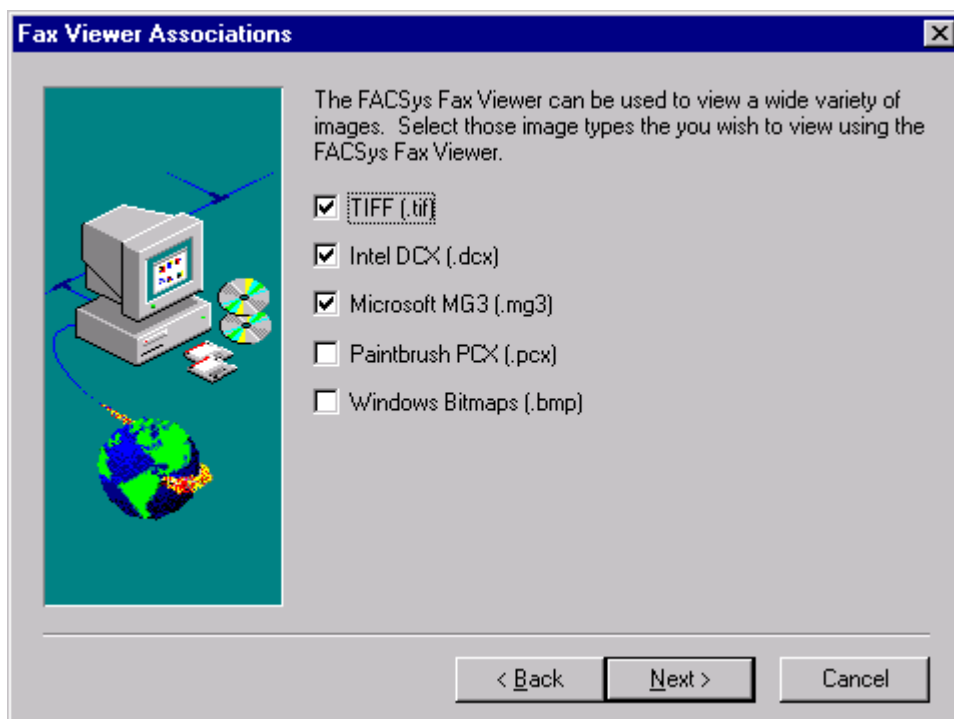


- 6 By default, the FACSys client software is installed in the C:\Program Files\Optus\FACSys directory.
 - If the default directory is not acceptable, click the Browse button, then build a new path from the options in the Browse dialog box.
 - If the default directory is satisfactory, click the Next button. The Folder Selection screen displays.



- 7 By default, Setup places the FACSys client software icons in the FACSys 4.10 folder (which is indicated in the Program Folders field).
- If the default program folder is satisfactory, click the Next button. The Fax Viewer Associations screen displays.
 - If the default program folder is not acceptable, either:
 - Delete the default folder name from the Program Folders field, and type in a new program folder name, or
 - Choose a different folder from the list of existing folders

When the program folder is satisfactory, click the Next button. The Fax Viewer Associations screen displays.



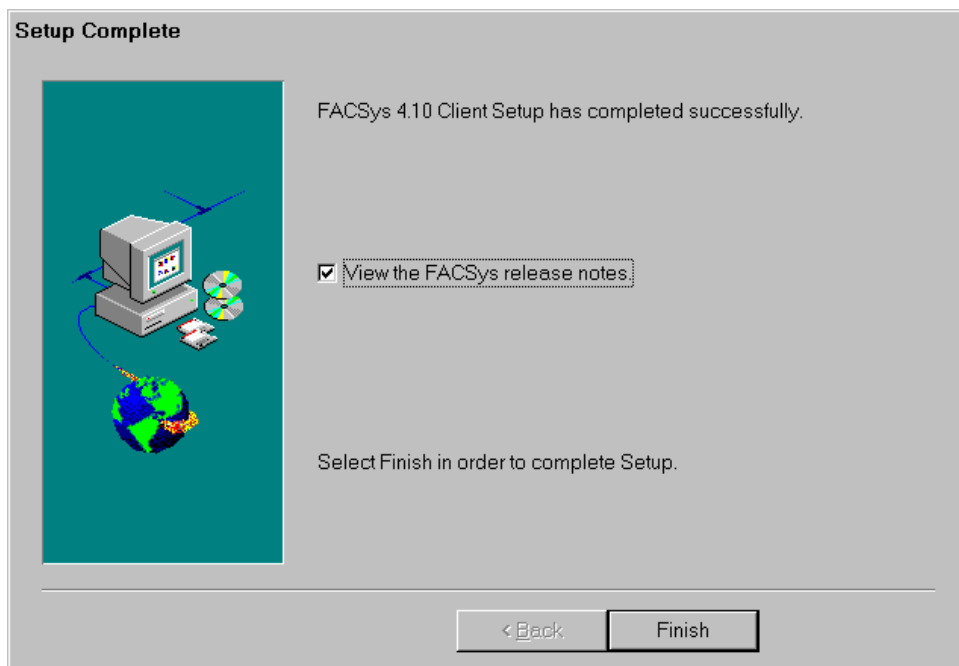
- 8 Panagon Fax does not use the FACSys Fax Viewer.
 - If you want to use the FACSys client software to fax documents other than FileNET images, you may want to set up this functionality. For details, refer to the FACSys documentation.

When you have correctly set up this functionality, click the Next button to continue with the Setup process.

- If you do not want to use the FACSys client software to fax documents other than FileNET images, click the Next button to accept the default values and continue with the Setup process.

The Setup utility stops any FACSys process that might be running, then copies the client software to the server's disk.

When the copy process is complete, the Setup Complete screen displays.



- 9 This Setup Complete screen provides information on your installation status and provides an option to read or skip the release notes.

- If you want to view the release notes, enable (check) the checkbox “View the FACSys release notes.”
- If you do not want to view the release notes, disable (do not check) the checkbox “View the FACSys release notes.”

We recommend that you read the release notes.

- 10** Click the Finish button to complete the installation. Depending on the option that you selected in the previous step, the FACSys Client release notes may or may not display.

Test the Installation

To ensure that you can send and receive faxes through the fax devices installed in the server, perform the following steps.

- 1** Log on to the Network Fax Server with the logon name you defined for Panagon Fax.
- 2** Send a fax from a nearby fax machine to the telephone number of each fax device in the fax server. (If you installed CSI routing, you can skip this step.)
- 3** Use the Received Folder window on the FACSys server software to verify that the fax was received and routed to the intended user. For more information on the FACSys Receive Folder window, refer to the Optus FACSys documentation.
- 4** Verify that you can send faxes through each fax port. Since ports are allocated dynamically for outbound fax, you must disable all ports, then enable one port at a time and send a fax through it to ensure that it is functional.

For more information on sending faxes, refer to the Optus FACSys documentation.

5

Installing and Configuring Panagon Print Software for Outbound Fax

This chapter describes installing the fax-related portions of the Panagon Print application. To install other features available through Panagon Print, refer to the *Panagon Print Installation Guide*.

Before you can install and configure Panagon Print, you must have completed the following:

- You must configure a fax queue on the IDMIS. If this task is not complete, refer to [Chapter 3, “Configuring the IDMIS Software,” on page 66](#) for details.
- You must install Windows NT and the Optus FACSys software on the fax server. If these tasks are not complete, refer to [Chapter 2, “System Setup,” on page 54](#) and [Chapter 4, “Installing the Network Fax Server Software,” on page 79](#) for details.

Installation Overview

The installation procedure consists of the following steps:

- 1 Log on to Windows NT as an Administrator.
- 2 Run the Panagon Print Setup program WFPSETUP.EXE to install the core Panagon Print software and the optional outbound fax software on the fax server. The core software installs automatically.
- 3 Select the Install Software for Outbound Fax option to install the Outbound Fax files. Panagon Print executable files copy to the c:\fnsw directory by default, while data files copy to c:\fnsw_loc.
- 4 Configure the Panagon Print software. The Configuration utility starts automatically once the Panagon Print software is installed.
 - a Enter the name of the IDMIS server you configured with the fax queue. When you enter the IDMIS server name, the fax queue you configured for the fax server displays.
 - b Configure the fax queue with Network Fax values that indicate to which Network Fax Server you want to map the queue.
- 5 Restart the fax server with the values assigned during configuration.

Running Panagon Print Setup

Follow the steps in this section to run the Panagon Print Setup utility.

Throughout the Setup procedure, you can view online help by clicking the Help button on the Setup dialog boxes.

- 1 Log on to Windows NT as an Administrator.
- 2 Insert your Panagon Print CD in the drive to display the Panagon Print Setup dialog box. The Panagon Print Setup dialog box displays.



Panagon Print consists of a series of core files and options.

Core Files

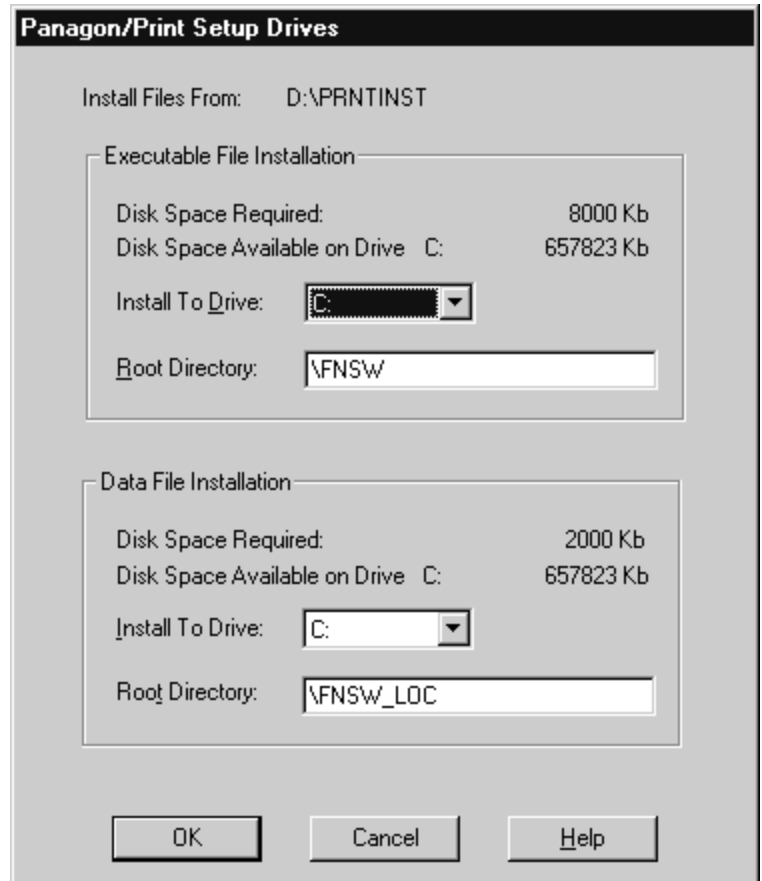
Core files are required for all print and fax servers. Setup installs these files automatically.

Options

Options are available on the main Setup dialog box. You select the options you want to install on the fax server from those in the dialog box.

- By default, the option “View the Release Notes for this Release” is selected. If you are performing a new installation, you cannot deselect this option. If you are reinstalling Panagon Print software, you can deselect it, although we strongly recommend that you review the information in the Release Notes. The information in the Release Notes is not in the online Help or printed manuals.
 - You must select the option “**Install Software for Outbound Fax.**”
 - The other options in the Setup dialog box relate to the print server function. For information on them, click the Help button at the bottom of the dialog box or refer to the *Panagon Print Installation Guide*.
- 3 After you select the options you want to install, click the Continue button. The Release Notes display in a WordPad window.
 - 4 When you finish reading the notes, use the Exit option on the WordPad File menu to resume the setup process.

The Panagon Print Setup Drives dialog box displays.

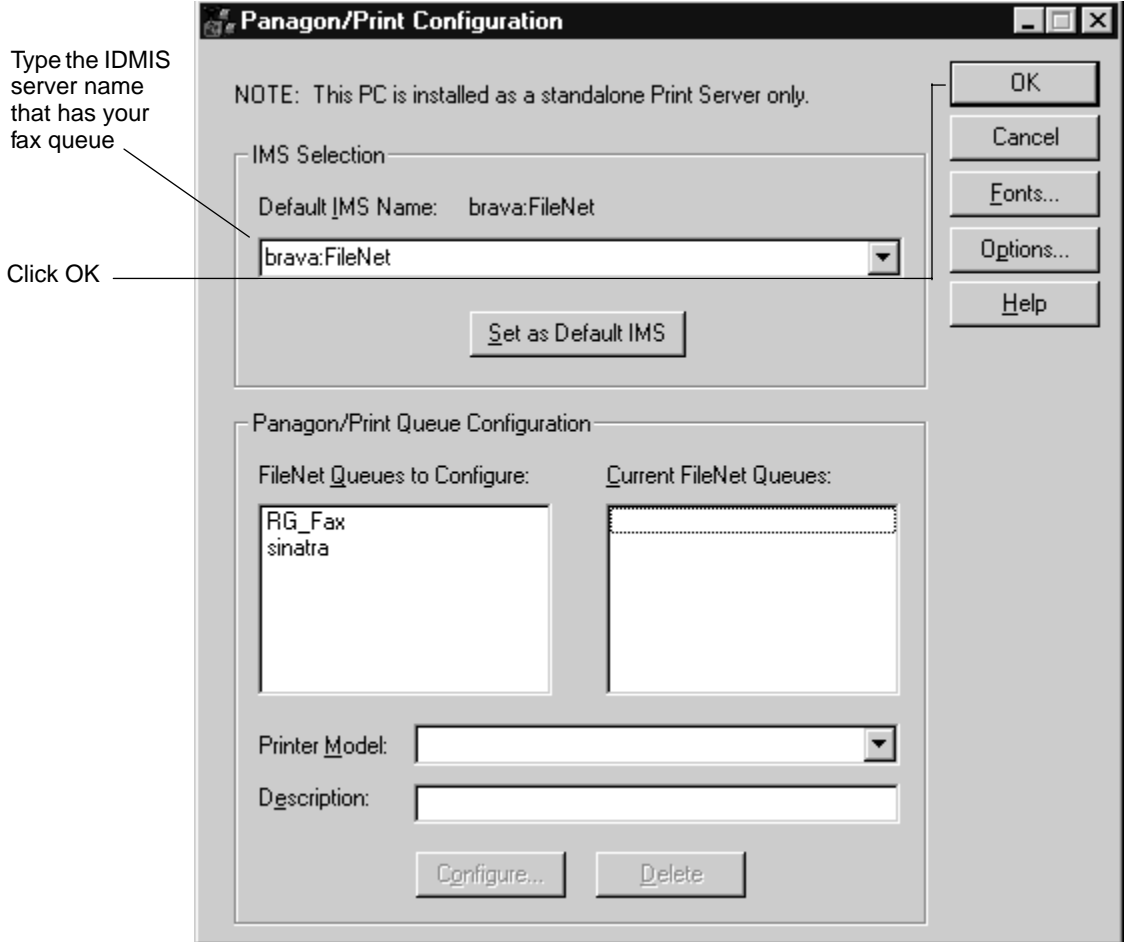


- 5 Specify the drive you want to install Panagon Print executable and data files. By default, executable files are installed in c:\fnsw\, and data files are installed in c:\fnsw_loc and cannot be changed. You can change your drive from the default C: .

- 6 When the Setup Drives values are satisfactory, click OK. You will be asked to verify your input with Yes or No.
- 7 The software copies the Panagon Print core software files plus any options you selected in the main setup dialog box to the directories specified in the Setup Drives dialog box.
- 8 A pop-up message box asks you if you want to add the Panagon/Print Administrator icon to the Startup Group. Press Yes if you want Panagon Print to start automatically when you log on to Windows NT.

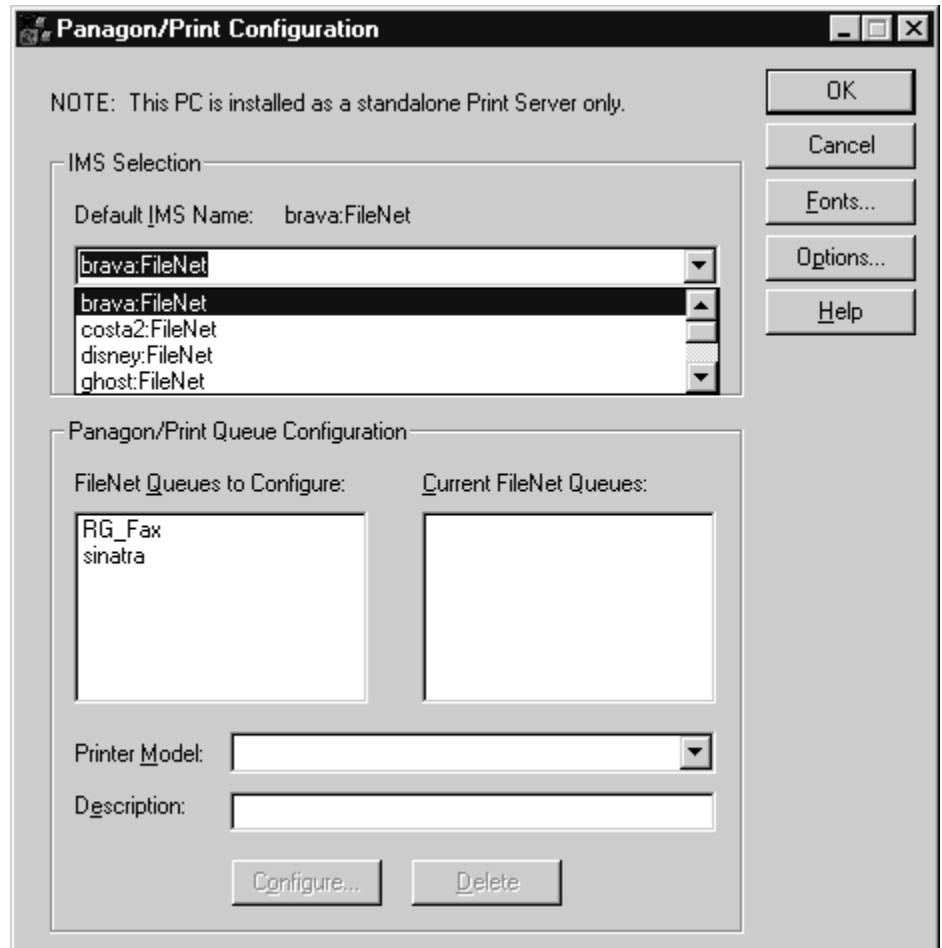
A second pop-up message box asks you if you want Setup to add the Panagon Fax Manager icon to the Startup Group. Press Yes if you want the Panagon Fax Manager to start automatically when you log on to Windows NT.

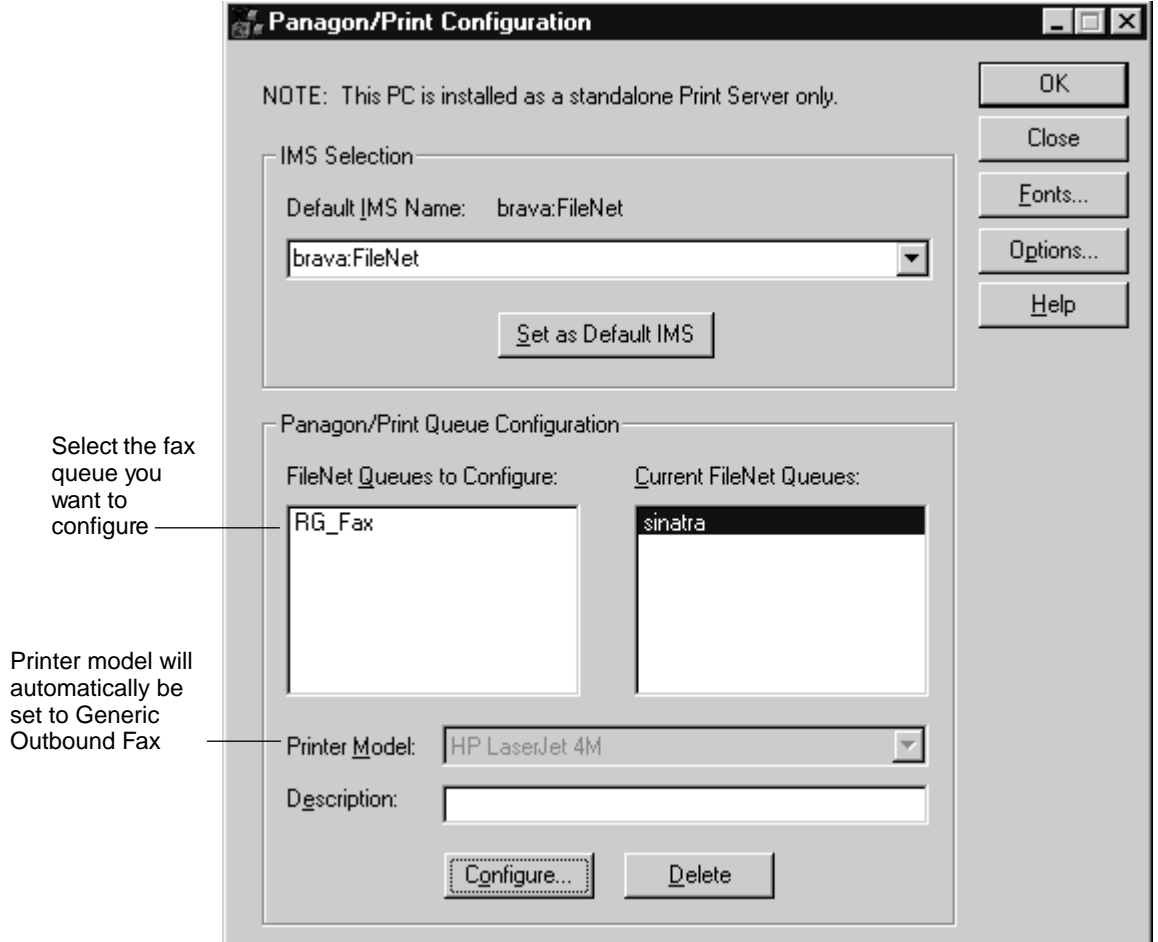
- 9 When installation is complete, the following events occur:
 - If you installed printing options, you will see printer-related dialog boxes. For more information, refer to the *Panagon Print Installation Guide*.
 - The Panagon Print Setup utility creates a Panagon Print program group, then adds icons for the Panagon Print Setup, Configuration, and Administration programs to the group.
 - The Panagon Print Configuration program starts.



- 10 Type the IDMIS server name that has your fax queue, then click OK. Set the server you wish to have as your default by pressing the Set as Default IMS button.

- 11 The print server establishes a session with the IDMS server. A list of all print and fax queues on the IDMS server displays in the FileNET Queues to Configure list box.





- 12 Select the fax queue you want to configure.
- 13 In the Printer Model field, the value is automatically set to Generic Outbound Fax. This value cannot be changed.

- 14 If desired, enter a description in the Description field. You can enter up to 128 alphanumeric characters.
- 15 Click the Configure button. The Generic Outbound Fax Printer Configuration dialog box displays.

In the Generic Outbound Fax Printer Configuration dialog box, you can define multiple network fax servers. The IDMIS fax queue is mapped to the network fax server whose name appears in the Server Name field.

For information on each field in this dialog box, refer to the *Online Help*. For details on the Report True Job Status to IDMIS field, refer to the section [“Report True Job Status to IDMIS” on page 180](#).

Map this fax queue to this Network Fax Server

Generic Outbound Fax Printer Configuration

FileNet Queue Name: fax30_4

LanFax Server

Server Name:

Server Type:

Logon Name:

Password:

PostScript

Image Data Encoding

Raw Binary

ASCII Hex

ASCII 85

Center Image on Print

Report True Job Status to IMS

- 16** In the Generic Outbound Fax Printer Configuration dialog box, click OK to exit the Configuration program. A pop-up message box confirms that you successfully configured the queue. Press OK.

If you did not configure all the queues listed in the FileNET Queues to Configure list box, a pop-up message warns that you have not configured all available queues. Jobs sent on queues that are not mapped to a printer or to the generic outbound fax option will not be processed by the print server.

The Generic Outbound Fax Printer Configuration dialog box displays the queue not configured. Change the configuration parameters as you wish and press OK.

- 17** After configuring successfully, the Panagon Print Configuration Screen displays again. Press OK and restart the print server.

- 18** When Windows NT restarts, log on and start the Panagon Print Administrator program.

If the Administrator icon is in the Windows NT Startup group, the Administrator program starts automatically. To start the Administrator manually, double-click the Administrator icon in the Panagon Print program group.

Report True Job Status to IDMIS

This parameter determines whether the actual fax status (successful or failed) is reported to the IDMIS and thus to the user who originated the fax. To implement the True Status feature, you must have IDMIS version 3.4.1 or later and WorkForce Desktop version 4.1 or later.

- If the checkbox “Report True Job Status to IDMIS” is disabled (unchecked), the fax server software reports the fax’s status as complete as soon as it hands the fax job to the Network Fax Server send queue. A Complete message displays on the user’s desktop as soon as the job enters the queue, regardless of the job’s actual status.
- If the checkbox “Report True Job Status to IDMIS” is enabled (checked), the fax software monitors the Network Fax Server send queue to determine the actual status of the fax job. The actual fate of the fax (successful or failed) is reported to the IDMIS and, thus, to the fax originator. This can take time, depending on the depth of the send queue, making it appear as though throughput has degraded; however, this parameter does not affect throughput.

Changing Other Panagon Print Controls

After you define the Network Fax Server(s), you might need to make changes to some of the other Panagon Print controls. In most cases, you can use the system defaults. For more information, refer to the *Online Help* and the *Panagon Print Installation Guide*.

Enabling Automatic Startup

The Panagon Print and Panagon Fax Manager applications must be running on the fax server before you can send and receive faxes.

If you want to have both applications start automatically when you turn on the fax server PC, move their icons from the FileNET Panagon Server Applications program group to the Startup program group.

Setting Up the Default Cover Page for Outbound FileNET Faxes

The Panagon Print installation software copies a default cover page called cover.lgo to the \fnsw_loc\sd directory. This default cover page precedes a fax if the user enabled the Cover Page option in the Work-Force Desktop Print application's Fax Options dialog box.

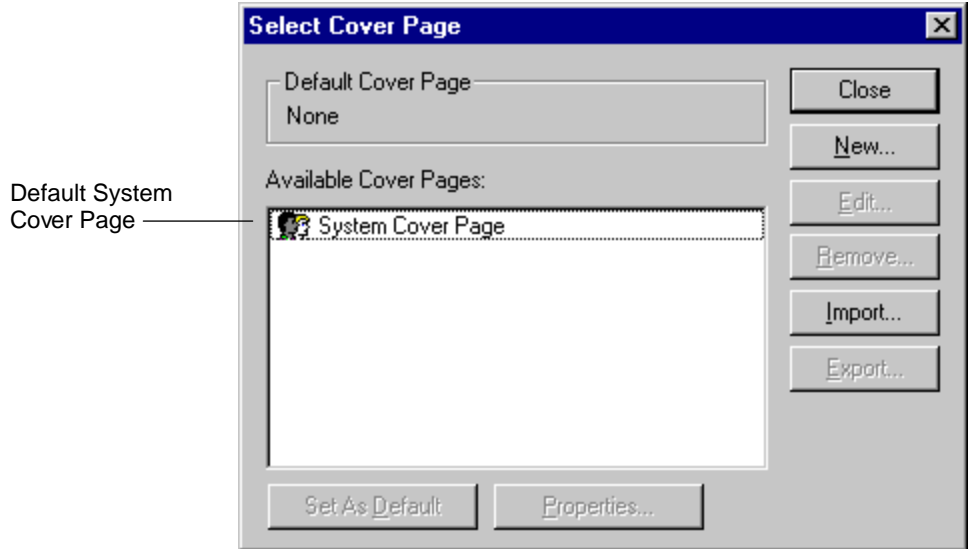
An Optus FACSys image file is the basis for the cover.lgo cover page. If you cannot use the default page, you must modify it to suit your requirements with the FACSys Cover Page Editor.

Note The Cover Page Editor is part of the FACSys Client software. If you did not install the Client software as part of the Optus FACSys installation, you must do so before proceeding with the directions in this section.

- 1 Start FACSys by double-clicking the FACSys icon from the FACSys program group.
- 2 From the FACSys File menu, choose Select Cover Page. The Select Cover Page dialog box displays.

5 Installing and Configuring Panagon Print Software for Outbound Fax

Setting Up the Default Cover Page for Outbound FileNET Faxes



- 3 A default system cover page displays that is already defined in the FACSys application.

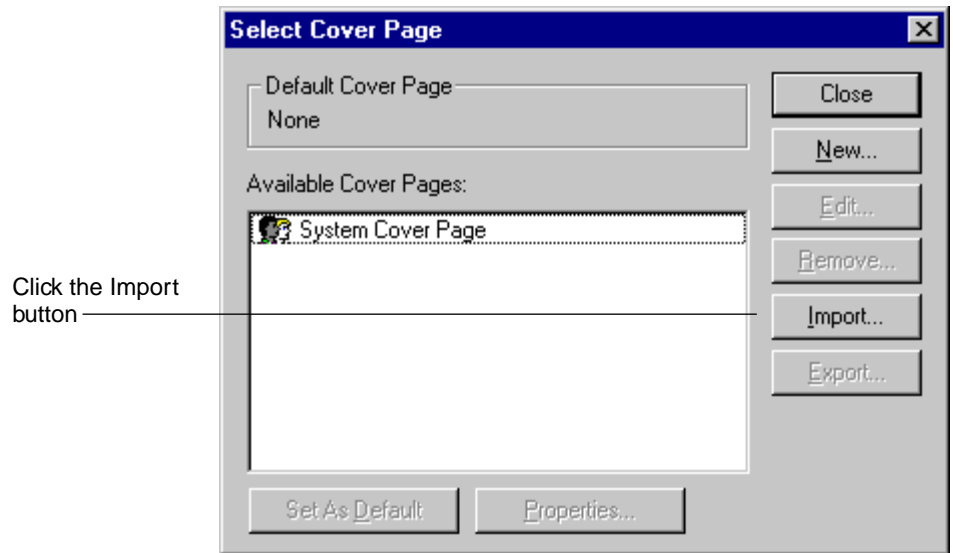
You must use the cover page file named `cover.lgo` in the `\fnsw_loc\sd` directory as the default cover page for all faxes sent through the Fax Manager.

5 Installing and Configuring Panagon Print Software for Outbound Fax

Setting Up the Default Cover Page for Outbound FileNET Faxes

You will not be modifying the default System Cover Page that displays in the Available Cover Pages list box.

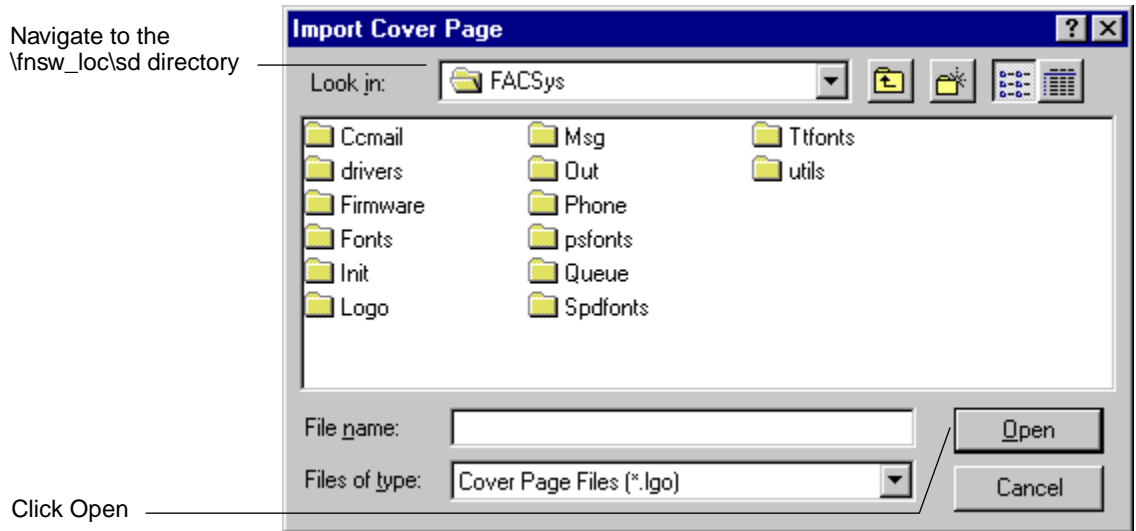
Note Specific buttons are disabled on the Select Cover Page dialog box when the dialog box initially displays, as shown in the following example. These buttons become enabled only when a cover page is selected in the Available Cover Pages list box.



5 Installing and Configuring Panagon Print Software for Outbound Fax

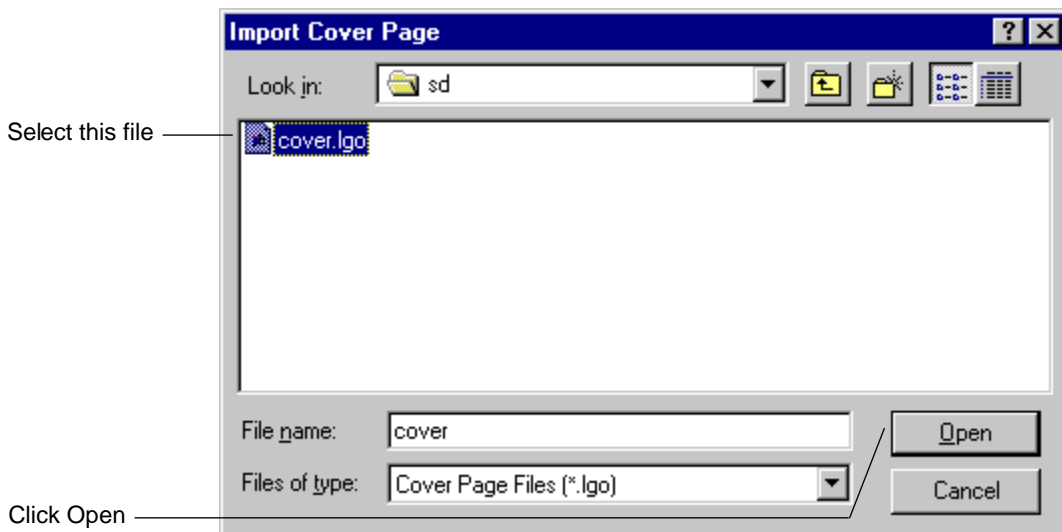
Setting Up the Default Cover Page for Outbound FileNET Faxes

- 4 Click the Import button. The Import Cover Page dialog box displays.



- 5 Change the path in the Look in list box so that it points to the \\fsw_lo\sd directory. By default, this directory is located on drive C; however, the person who installed FACSys on your PC may have placed it on another drive.

- 6 Click Open. The contents of the \fnsw_loc\sd directory display.



- 7 From the list of .lgo files in the \fnsw_loc\sd directory, select the cover.lgo file.

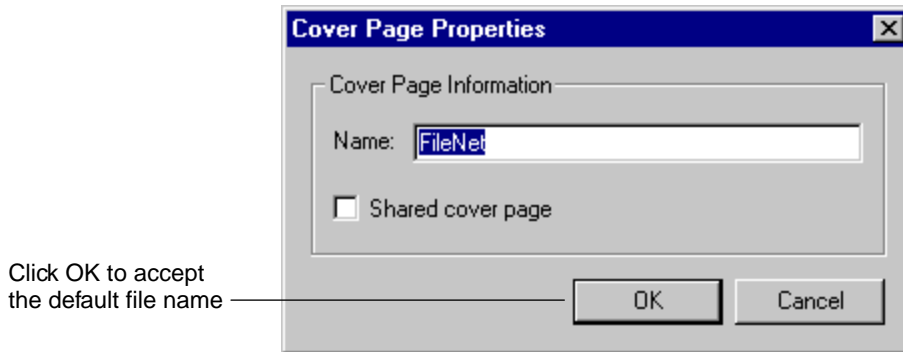
Tip If you do not see a list of .lgo files in the list box, even with the Files of type field set to *.lgo, go to the File name field and replace the existing text by typing the following text:

***.lgo**

Then, press the Enter key.

This forces all files of type .lgo located in the currently selected directory to display in the list box.

- 8 Click Open. The Cover Page Properties dialog box displays.



- 9 By default, the software seeks to name this cover page FileNET. To make it easy to identify as the Panagon Fax default cover page, we recommend that you accept the default name.

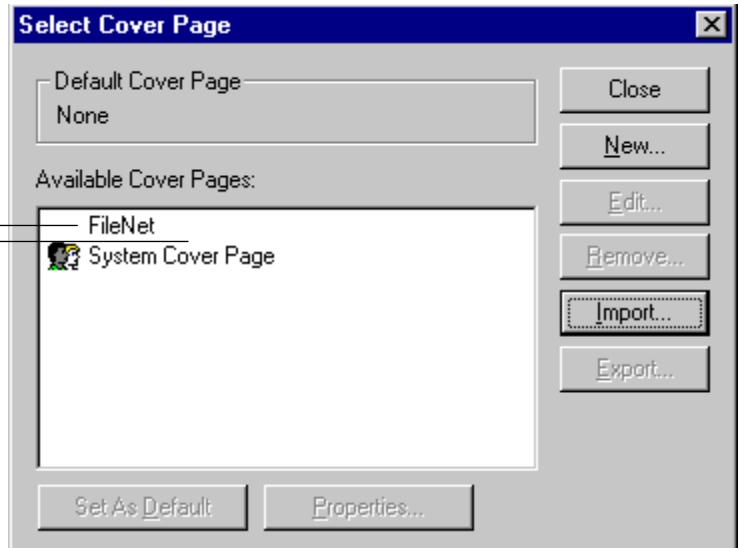
- 10 Click OK to accept the default name and return to the Select Cover Page dialog box.

In the Select Cover Page dialog box, the new cover page is added to the list in the Available Cover Pages list box.

Select this
cover page

Click Export

New cover page

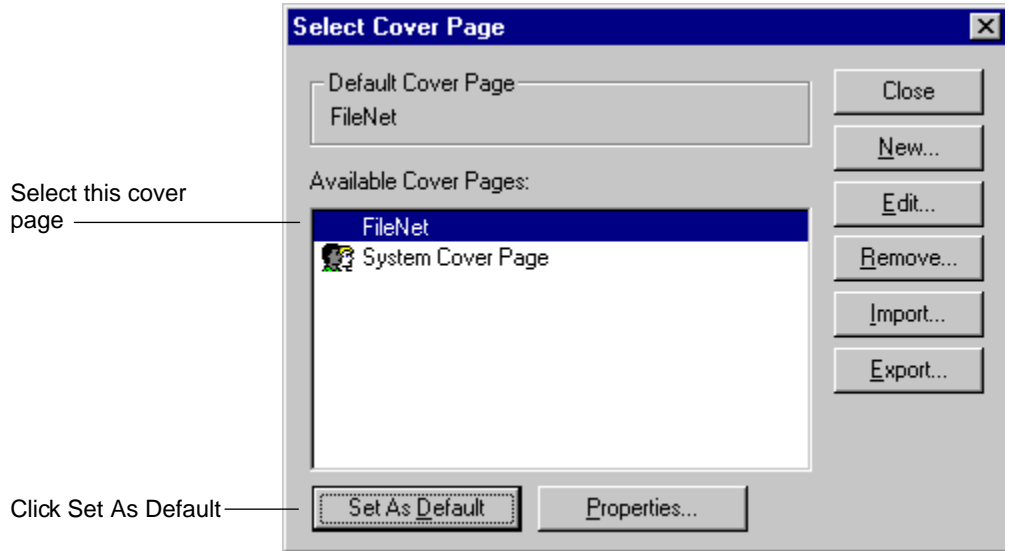


- 11 Set the Panagon Fax cover page as the system default by performing the following steps.
 - a Select (single-click) the cover page.
 - b Click the button Set As Default.

The Panagon Fax cover page now displays in the Default Cover Page section at the top of the screen (previously, the Default Cover Page section contained the word None).

5 Installing and Configuring Panagon Print Software for Outbound Fax

Setting Up the Default Cover Page for Outbound FileNET Faxes

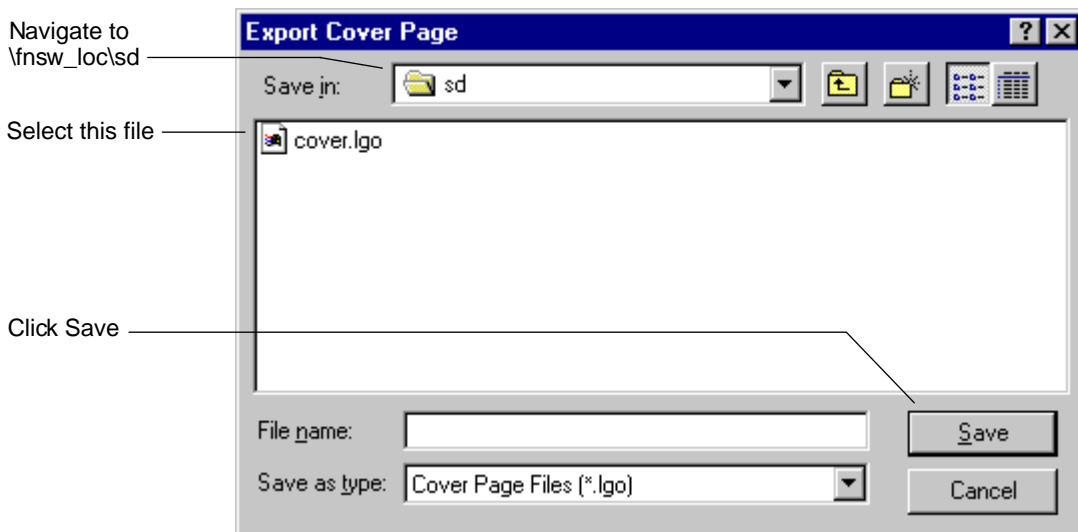


The cover page is sent with each outbound fax transmitted through the fax server. If you have users using the FACSys client to send and receive faxes through the FACSys server, they can define their personal cover pages, which will override the system default cover page.

Proceed as follows, depending on what you want to do:

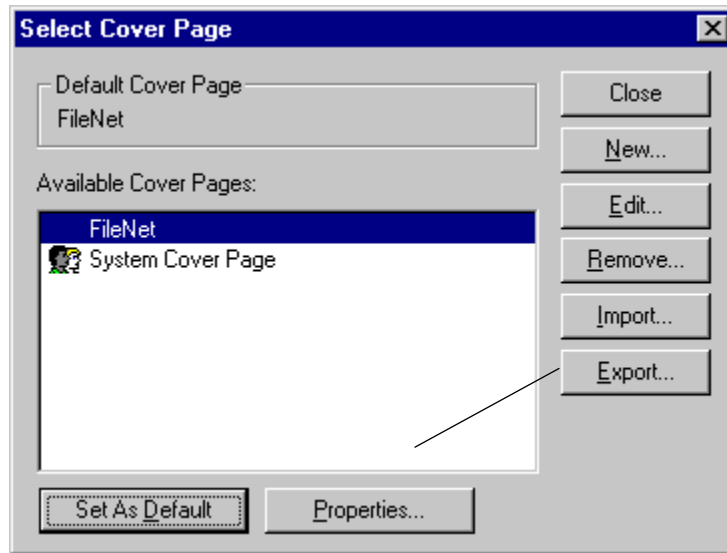
- If you want to modify the cover page, go to [Step 12 on page 189](#).
- If you do not want to modify the cover page, go to [Step 13 on page 190](#).

- 12** To modify the cover page from its original appearance, perform the following steps:
- Double-click the cover page in the list box. The FACSys Cover Page Editor starts, allowing you to edit the cover page. For details on using the Cover Page Editor, refer to the FACSys online help or the FACSys printed documentation.
 - When the cover page is satisfactory, using the Cover Page Editor, locate the `\fnsw_loc\sd` directory and select the `cover.lgo` file.



- Click Save to save the changes. The Cover Page Editor closes, and the Select Cover Page dialog box displays again.

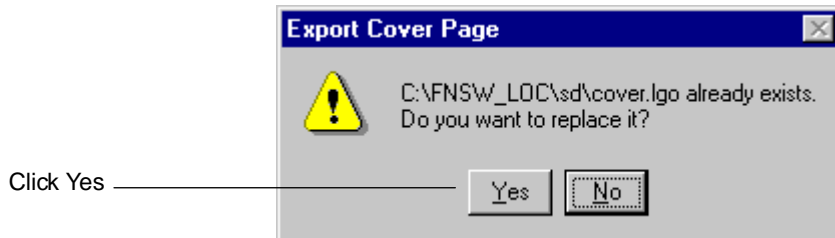
Note The Save function in the Cover Page Editor saves the changes to a file stored in the \facsys\logo directory. However, the cover.lgo file must be located in the \fnsw_loc\sd directory.



- 13 In the Available Cover Pages list box, select the Panagon Fax Cover Page entry.
- 14 Click the Export button. The Export Cover Page dialog box displays. This dialog box warns that you will overwrite the existing cover.lgo file.

5 Installing and Configuring Panagon Print Software for Outbound Fax

Setting Up the Default Cover Page for Outbound FileNET Faxes



- 15** Click the Yes button. This takes you back to the Select Cover Page dialog box.
- 16** Click the Close button on the Select Cover Page dialog box to exit.

Configuring the Panagon Fax Manager

The Panagon Fax Manager application interfaces the Panagon Fax Server with a local or remote Network Fax Server. The Panagon Fax Manager is installed automatically as part of the Panagon Print application and it performs its functions automatically without user intervention.

The Panagon Fax Manager tracks the status of outbound faxes and removes outbound faxes with a status of Complete and IDMISS Notified from the Network Fax Server send queue.

The Panagon Fax Manager also creates a journal log and provides a means of moving journal entries from the log file to a journal file on a local or mapped network drive. Journal files can be migrated to the IDMISS or to a backup drive, if desired.

The first time you start the Panagon Fax Manager, it is in configuration mode. You set parameters in a series of function tabs to automate outbound fax and journal entry migration.

After you configure the Panagon Fax Manager, the main window displays each time you start the program; however, the Panagon Fax Manager is no longer automatically in configuration mode. To adjust parameters, use the Tools menu and Configuration option to access the Panagon Fax Manager Configuration dialog box.

Automatic Startup

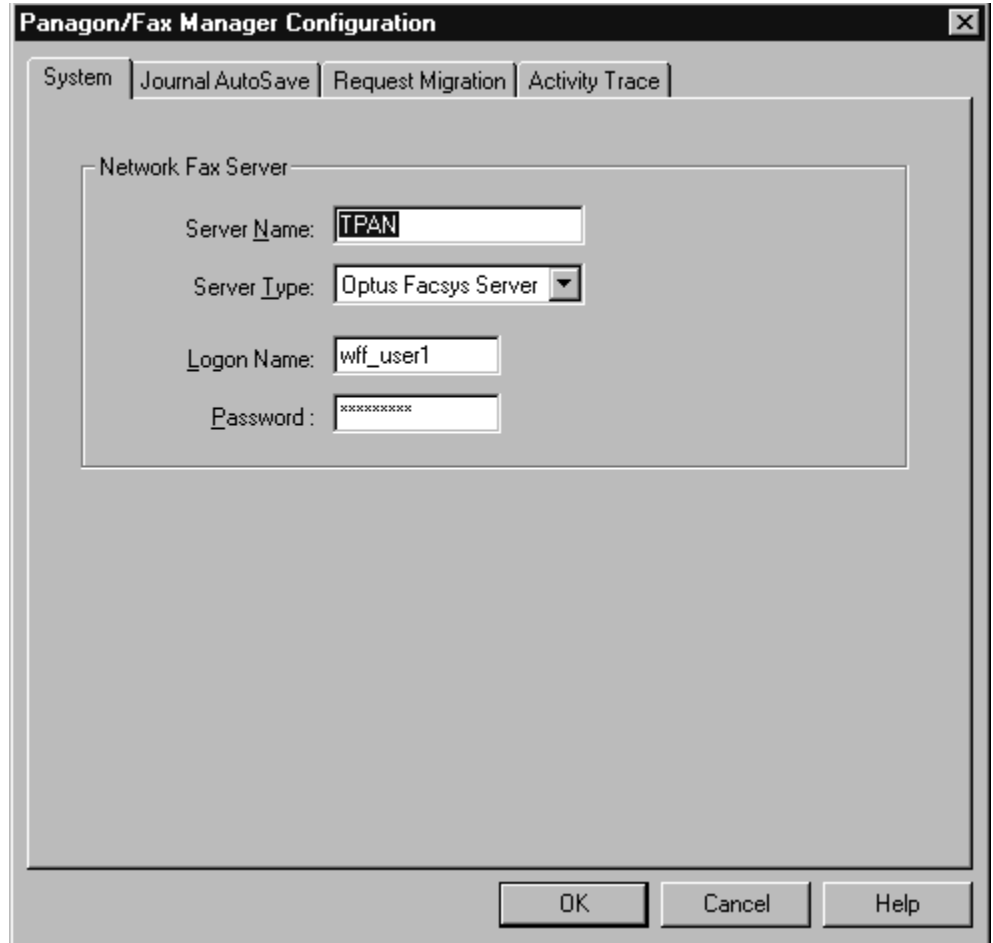
You must start the Panagon Fax Manager when you want to use Panagon Fax. Therefore, we recommend that you move the Panagon Fax Manager program icon from the FileNET Panagon Server Applications program group to the Startup program group. Doing so starts the Panagon Fax Manager automatically each time you start Windows NT.

Starting the Configuration Dialog Boxes

If the Panagon Fax Manager does not start automatically, start it manually by double-clicking its icon in the FileNET Panagon Server Applications program group. When you start the Panagon Fax Manager for the first time, the Installation Wizard automatically displays configuration dialog boxes. You must complete the Fax Manager configuration process before using the software for the first time.

After Panagon Fax is configured, you can start the configuration software from the Fax Manager window. Use the Tools Menu and Configuration option to access the Fax Manager Configuration dialog box.

The following screen is typical of those in the Installation Wizard. Note that the configurable fields in the Installation Wizard screen are identical to those in the configuration function tabs shown throughout this chapter.



Configuring System Parameters

Use the options in the System tab or Installation Wizard Service dialog box to configure system parameters. Fields in the System tab perform the following functions:

- Define the Panagon Fax Manager system values
- Map the Fax Manager to a specific Network Fax Server

For field definitions, refer to the *Fax Manager Online Help*.

The screenshot shows a dialog box titled "Panagon/Fax Manager Configuration" with a close button (X) in the top right corner. The dialog has four tabs: "System", "Journal AutoSave", "Request Migration", and "Activity Trace". The "System" tab is selected. Inside the dialog, there is a section titled "Network Fax Server" with a rectangular border. This section contains four fields: "Server Name" with the value "TPAN", "Server Type" with a dropdown menu showing "Optus Facsys Server", "Logon Name" with the value "wif_user1", and "Password" with the value "*****". At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help".

Configuring Journal AutoSave Parameters

The fields in the Journal AutoSave tab or Installation Wizard dialog box enable and automate the process of saving fax journal data to file(s) on a local or remote drive.

If you enable Journal AutoSave, the binary information in the fax journal file, FAXJRN.DAT, is saved in ASCII format to a text file. This text file resides in the directory shown in the Journal AutoSave Directory field. AutoSave occurs automatically when the AutoSave interval expires or when the journal entry count reaches a specified maximum limit.

The screenshot shows a dialog box titled "Journal AutoSave". At the top left, there is a checked checkbox labeled "Enable Journal AutoSave". Below this, a section titled "Parameters for Journal Files" contains several settings:

- Entry Status:** A group box containing three radio buttons: "Successful", "Failure", and "Both". The "Both" option is selected.
- Format:** A dropdown menu currently set to "Normal".
- AutoSave Interval:** A text box containing "60" with "(5-1440 mins)" to its right.
- Journal AutoSave Directory:** A text box containing "c:\fnsw_loc\migrate\journal".
- Maximum Journal Entry Count:** A text box containing "500" with "(100-1000 entries)" to its right.
- Journal Log File:** A text box containing "c:\fnsw_loc\tmp\FAX\JRN.DAT".

At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Cancel", and "Help".

When you configure a journal file, you specify the type and status of the journal entries you want written to it. The journal file name is system-assigned.

The format is:

JRN<mmddx.yyy>

where:

<mmdd> represents the month and date.

<x> represents the journal file designation (Journal File One = a; Journal File Two = b; and Journal File Three = c).

<yyy> represents the sequence (.001 is the first file, .002 is the second, and so on).

For field definitions in the Journal AutoSave tab, refer to the *Panagon Fax Manager Online Help*.

Configuring Request Migration Parameters

The fields in the Request Migration tab or Installation Wizard dialog box are used to configure the Fax Manager to automatically send outbound FileNET fax images to the Optus FACSys fax queue.

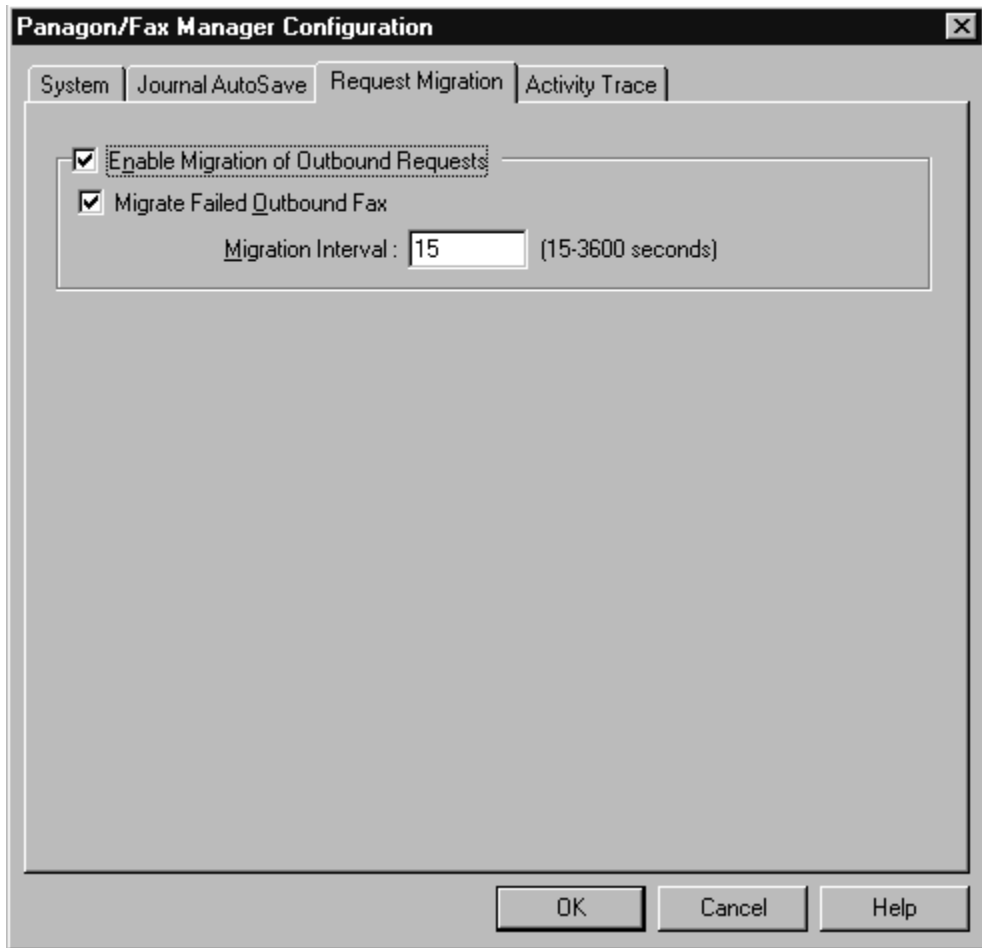
Migration Process

For outbound faxes, the Fax Manager checks the FACSys queue periodically to determine fax status. It deletes fax entries from the FACSys queue that are marked as complete, then updates the Journal Log file.

Migration of Outbound Requests

The “Migrate Failed Outbound Fax” checkbox is checked by default. If this checkbox is checked, the Fax Manager migrates all failed faxes (as well as successful ones). These faxes will be logged into the Journal Log file and will be deleted from the Optus send queue (or folder).

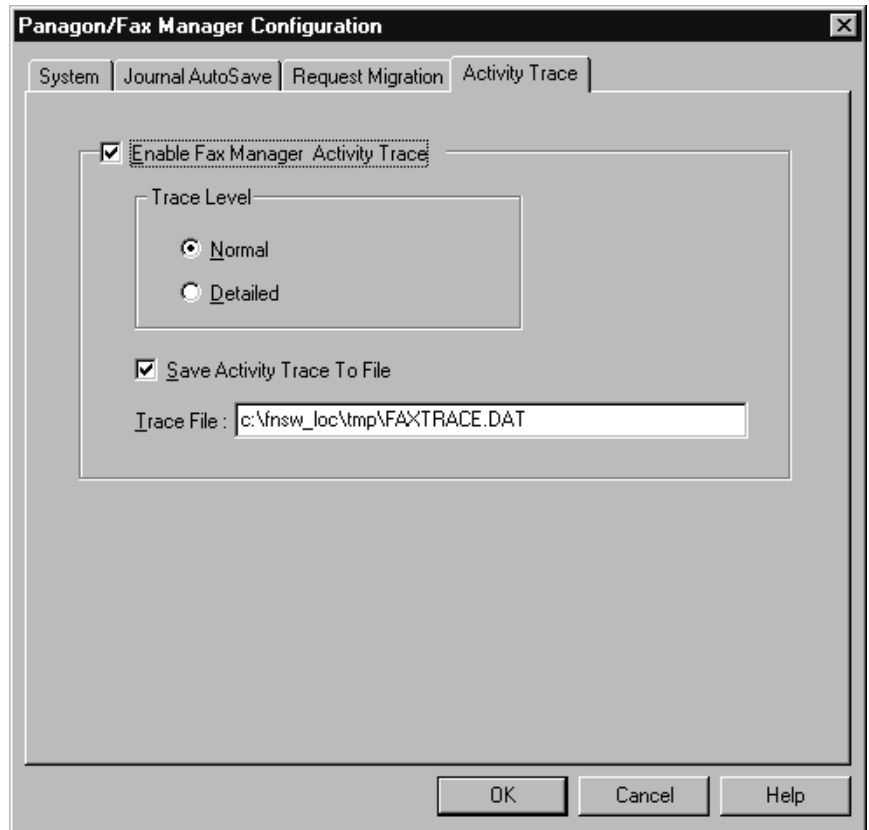
If the checkbox is not checked, the Fax Manager will not migrate any failed faxes. In this case, failed faxes will be logged into the Journal Log file and will remain in the Optus send queue (or folder). The user can later manually reschedule the failed faxes for resent from Optus. For field definitions, refer to the *Panagon Fax Manager Online Help*.



Configuring Activity Trace Parameters

The fields in the Activities Trace tab or Installation Wizard dialog box can be configured to enable an automatic trace of the Interfax Translation Layer DLL and the Fax Manager activities. Activity is recorded in a specified file. The user can determine what type of activity to trace, as well as how much detail to record.

For field definitions, refer to the *Panagon Fax Manager Online Help*.



Saving Parameter Values

When the parameters in the Fax Manager Configuration dialog boxes are satisfactory, click OK at the bottom of the dialog boxes. The main the Fax Manager window displays.

For details on the main window, refer to the *Panagon Fax Manager On-line Help* or the [*Panagon Fax User's Guide*](#) version 2.0.

Installing the Panagon Capture Software

This section describes how to install a limited set of Panagon Capture components on a non-scanning workstation with no Document Processing. Use the following procedure to install only specific Panagon Capture components, such as Indexing or Committal, which do not require any scanning or document processing functions. For example, you may want to install only the Fax component on a workstation that will only be used for indexing functions.

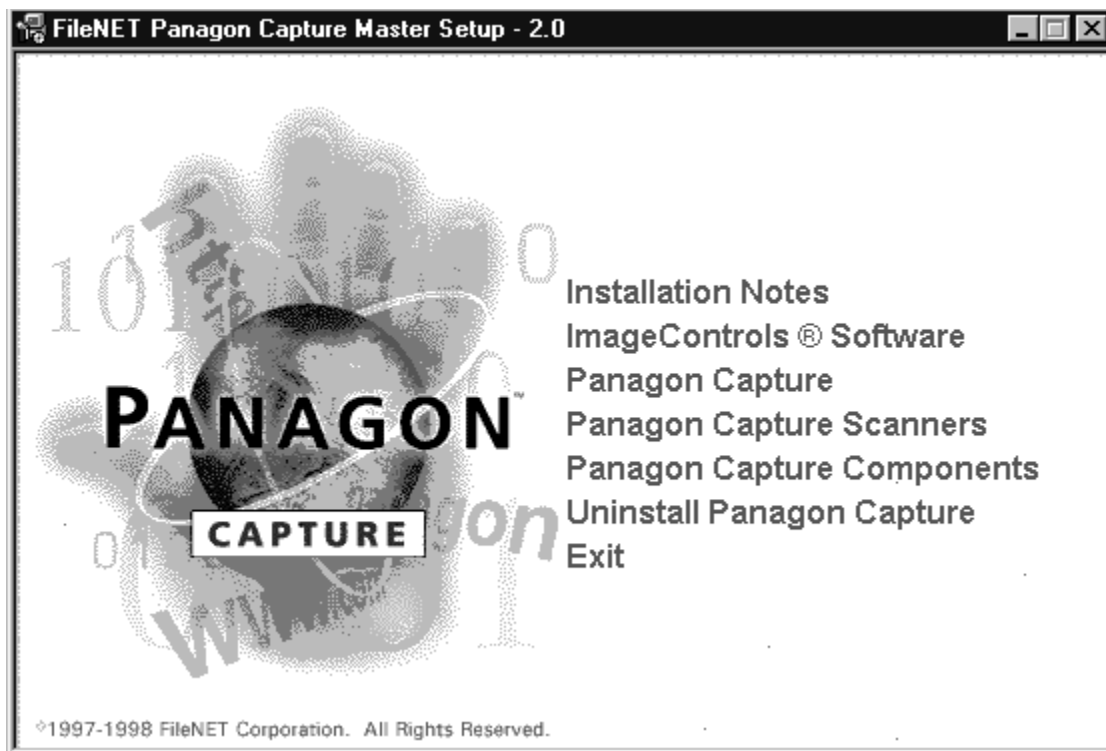
Note If you wish to install Document Processing, or a different type of installation, refer to the *FileNET [Panagon Capture Installation Guide](#)*, chapter, *Installing Software for Non-Scanning Workstations*.

Install the Panagon Capture Software

In this step you install the Panagon Capture software from the installation CD. If the Panagon Capture Installation menu is not displayed on the screen, reinsert the CD in the drive to redisplay it.

When the Installation menu appears, install the Panagon Capture software as follows:

- 1 Select Panagon Capture from the installation menu.

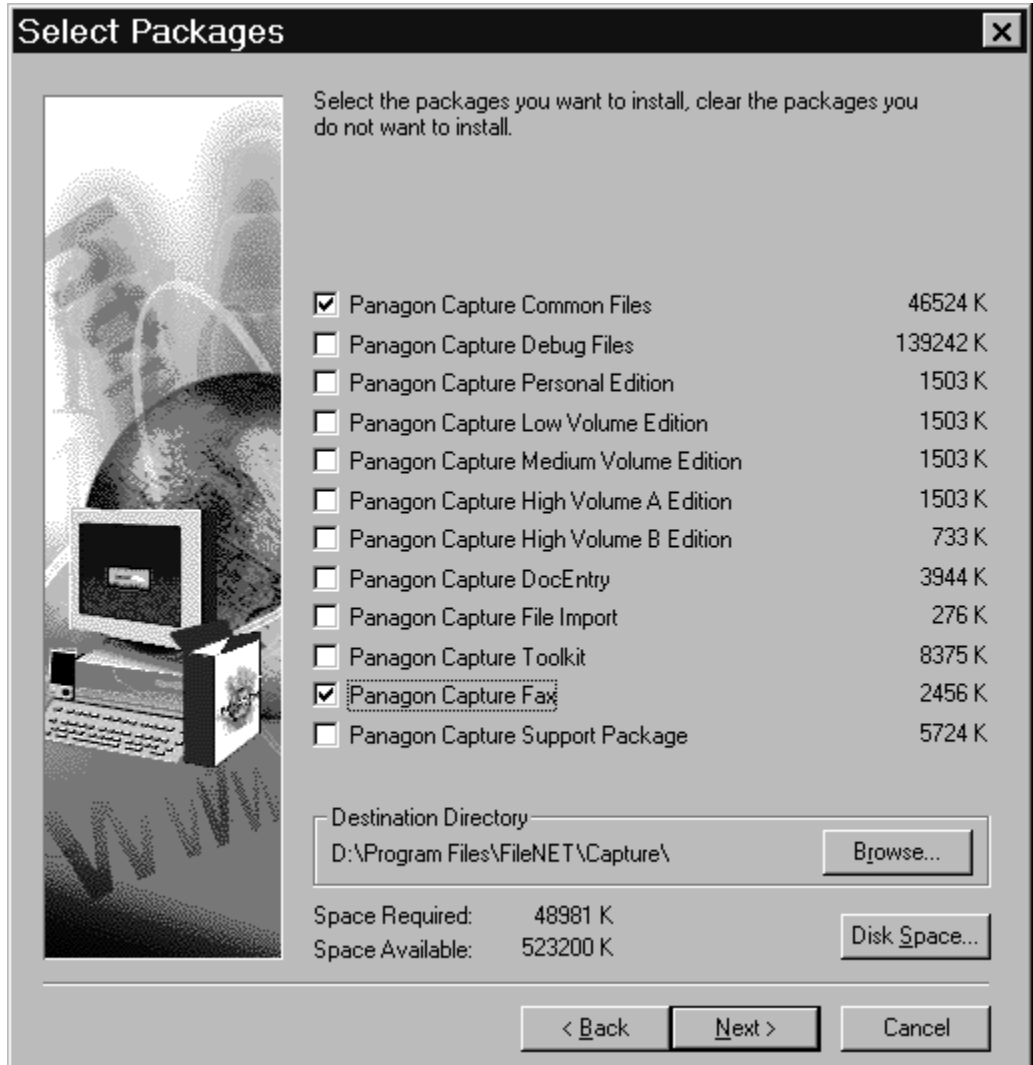


- 2 Use the Next button to advance through the introductory screens.

- 3 Use the Select Packages menu to specify which packages you are installing. By default, the first option is already selected, as illustrated in the screen that follows.
 - a Select the Panagon Capture components and packages based on the options you have purchased. For non-scanning workstations, you do not need to select a Capture Edition. For each package or option selected, you must have a valid authorization code from the licensing documentation.
 - b The default destination directory is shown near the bottom of the menu. Use the Browse button to select a different directory.

7 Installing the Panagon Capture Software

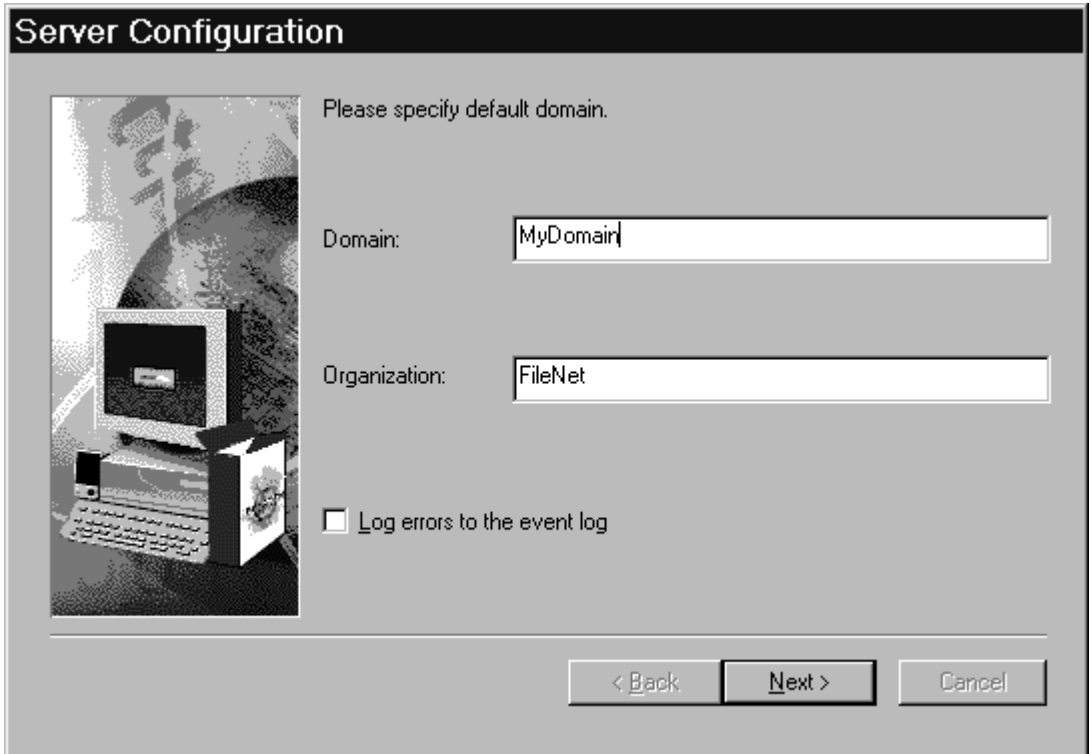
Install the Panagon Capture Software



c Click Next to advance to the next screen.

- 4 Enter the Authorization Key on the Registration screen for the package selected. If you are installing more than one package, you will be prompted for each additional key. The Software License document or Registration Card provides the Authorization Key(s). Click Next to continue.
- 5 Verify the destination directory for the report templates and databases on the Reports Directory dialog box. Use the Browse button to navigate to a new directory. Click Next to continue.
- 6 To specify the Program Folder for the Panagon Capture icons, click the Next button to accept the default, or select a folder from the list.
- 7 Review the selections from the screen, and use the Back button to go back and change selections, if necessary. Click Next to continue.
- 8 The installation program then installs the selected files on the system. Progress indicators allow you to monitor the installation as it proceeds. You can abort the installation using the Exit button (or by pressing the F3 key). Note however that doing so will leave an incomplete and potentially unstable installation which should be removed.

- Specify a default domain and organization name on the Server Configuration dialog box as appropriate for your installation. Obtain the Domain name and Organization from your system administrator, if necessary. (If you do not have an organization name, use the default of FileNet.) Enable the error logging option. Click Next to continue.



Server Configuration

Please specify default domain.

Domain:

Organization:

Log errors to the event log

< Back Next > Cancel

- 10 Specify user information for the workstation on the Logon Configuration dialog box. Contact the system administrator to obtain the User Name and Password. If you leave these fields blank, the operator will be prompted to enter the information each time Panagon Capture is started. Edit the Batch Service field to define a service other than Bes1, if desired.

Logon Configuration

Please specify default logon information.

WARNING: Panagon Capture will always use the user name and password specified below when connecting to the server. Leave these fields blank if you want Panagon Capture to prompt for them during startup.

User Name:

Password:

Batch Service:

< Back Next > Cancel

- 11 When the Setup FileNET Panagon Capture Scanners dialog box displays, click Next to skip to the next screen. These options are not used for non-scanning workstations.

- 12 When the Setup Panagon Capture Components dialog displays, expand the FileNET entry in the Available Components field. This displays the list of components available for installation. For each component you want to install, select the component from the list then click the Install button. Do not install the Scan/ImageControls or Scan/ISIS components from the list.
- 13 Click the Next button to advance to the next screen, then click Finish.

This completes the software installation procedure, and you are prompted to display the Release Notes file. Review the Release Notes carefully, if you have not already done so. After you have read the Release Notes, restart the computer.

After you Restart the computer, continue with [“Testing the Capture Installation” on page 211](#)

Testing the Capture Installation

When you have completed the installation process, verify the workstation is functioning properly with the Capture software. Use the following procedure to do this.

Start Panagon Capture

From the Windows NT desktop, select the Panagon Capture program from the FileNET Panagon Capture program group on the Start menu.

Enter a user name and password if prompted to do so.

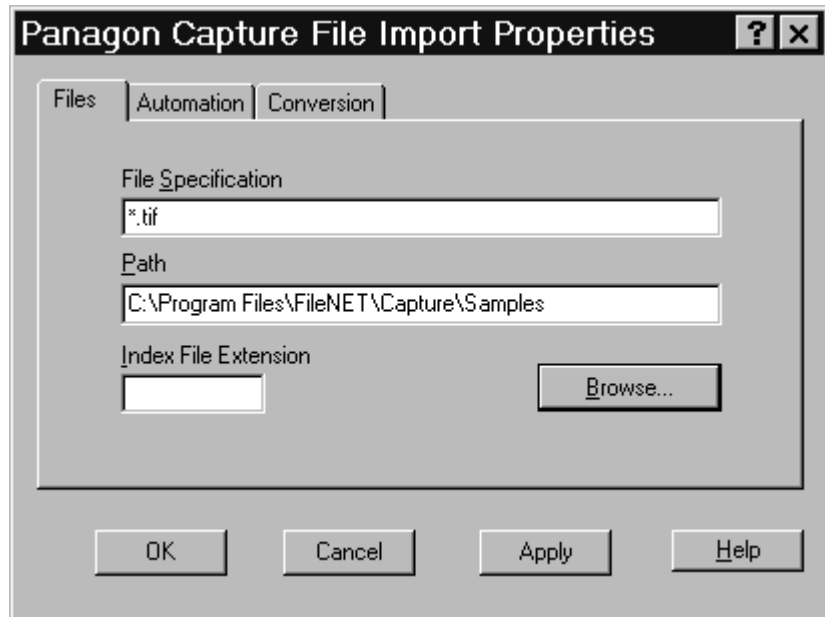
When the program loads, you should see three panes on the main Panagon Capture window. The top-left pane is referred to as the Tree View and is similar to the Windows Navigator. You should see at least one node in the Tree View, representing an available repository. (You should always see the Local Repository and any other available remote repositories.)

Create a New Test Batch

Before you can scan (or “capture”) an image, you must create a batch to scan it into. Use the following procedure to create a new test batch on the Local Repository:

- 1** Click the Local Repository node in the Tree View.
- 2** From the Edit menu, click the New Batch command. This displays the New Batch dialog box. Complete the dialog box as follows:
 - a** Enter the word “Test” for the batch name.
 - b** Select Default Template from the pull-down list for the template.
 - c** Select Default Settings from the pull-down list as the settings collection for the batch.
- 3** Click OK to create the batch. You will see a confirmation message when the batch has been created successfully.
- 4** Select (highlight) the new batch in the Tree. Next you will import some image files into this new batch.

- From the Tools menu, select the Configure command, then select the File Import option. This displays the Panagon Capture File Import Properties dialog box.



- Use the Browse button to navigate to the installation folder for the Panagon Capture files (\Program Files\FileNET\Capture by default) then select one of the \Samples folders located within the installation folder.
- Select specific files or enter a wild card character and file extension (*.tif or *.jpg) in the File Specification field on the dialog box, then click OK.

- 8** From the Tools menu, select the Start command, then select the File Import option. Each file will appear in the Tree and List view as it is imported into the batch.
- 9** Double click on one of the imported images to display it in the Work-space pane.

8

Configuring Panagon Fax Entry

Panagon Fax Entry is installed automatically as part of the Panagon Capture installation.

Panagon Fax Entry is designed to function automatically without user intervention. Therefore, you may wish to install Fax Entry on a PC that can be dedicated to running unattended and is not required for other tasks.

Fax Entry processes three types of incoming data:

- Faxes
- Files
- Journal (created by Fax Entry)

Each of these three types of data can be committed as documents to the IDMIS and moved to a Local or BES (Batch Entry Services) Repository, and/or written to a local or network drive.

Overview

A brief processing overview of follows:

- Inbound Fax Migration

Panagon Fax Entry processes all faxes received from the fax server for storage on the IDMIS and moved to a Local or BES Repository, and/or a local or network drive.

- File Migration

Panagon Fax Entry processes all files it finds in a specified directory for storage on the IDMIS and moved to a Local or BES Repository, and/or a local or network drive.

- Journal Log

Panagon Fax Entry creates a Journal Log, recording events that occur as inbound faxes/files are processed. The journal log can be written to the IDMIS for storage if desired and/or backed up to a local or network drive.

- Activity Trace

You can activate an optional System Trace function within Panagon Fax Entry. Activity trace information displays in a window and is saved to a file named FEJrn.log in the \FaxEntry\Journal directory.

To specify committal options, Fax Entry must be configured to use Panagon templates and settings.

These templates and settings used by Fax Entry must first be defined within Panagon. For information on defining settings collections and templates, see [“Before Running Panagon Fax Entry” on page 217](#).

The first time you start Panagon Fax Entry, it is in Configuration mode. In the Fax Entry configuration screens, a template and settings collection must be selected for each of the three types of data.

After you configure Panagon Fax Entry, the main application window displays each time you start the program. To adjust parameter values later, use menu options to access configuration choices in dialog boxes.

Before Running Panagon Fax Entry

Before running Panagon Fax Entry, you must first set up directories and folders specific to Panagon Fax Entry. You must also make your settings collections and templates used by Fax Entry.

Directories and Folders

When configuring Fax Entry, you will be asked to specify several directories used to store various types of files. Directories can be set up in different ways. For example, you could have a separate backup directories for each type of data, or you could put the Trace File in a separate directory.

The following is a suggested directory structure:

C:\FaxEntry

\Cache	Used in settings collections - Inbound Migration/ Cache option
\Error	Used in settings collections - Inbound Migration/ Error Directory option

\File	Used in Fax Entry- File Migration Configuration, File Migration Path
\Journal	Used in Fax Entry - Journal Migration Configuration, Journal File Name Used in Fax Entry - Trace Migration Configuration, Trace File Name
\Temp	Used in Fax Entry - System Configuration, Temporary directory
\Backup	Used in Fax Entry - File Migration Configuration, Backup Directory Used in Fax Entry - Inbound Migration Configuration, Backup directory Used in Fax Entry - Journal Migration Configuration, Backup Directory

Settings and Templates

Settings collections and templates used by Fax Entry must first be defined within Panagon for each of the following components:

- Fax
- File Import (Do not need to configure.)
- Event Activator
- Assembly
- Index
- Commit

For instructions to create a settings collection for Fax, see [“Creating a Settings Collection for Panagon Fax Entry” on page 222](#).

For instructions to create settings collections for the other components, refer to the *FileNet Panagon Capture Installation Guide*, chapter 9, *How to Capture Documents with Panagon Capture*, in the topic *Create a Settings Collection Using an Existing Document Class on the IDMIS*. When creating these settings collections, be sure to observe the following guidelines outlined in [“Settings Guidelines for other Components” on page 220](#) for each component.

After you have created your settings collections, create your templates. Refer to the *FileNet Panagon Capture Installation Guide*, chapter 9, *How to Capture Documents with Panagon Capture*, in the topic *Create a Template Based on the Settings Collection*.

Settings Guidelines for other Components

File Import The Fax Entry program will override all File Import component configuration options that you set in a settings collection.

Event Activator To assemble all pages of a Fax into a single document or to assemble each page of a Fax into a separate document, you do not need to create a settings collection for the Event Activator. However, if you want to do any special document assembly, you must create settings accordingly. Note that if you configure the Event Activator so that Assembly creates one or more new batches, the names of those batches will not start with the prefix set up in the Fax Entry configuration screens. Configure the Event Activator to specify the names desired for the new batches.

Assembly Set the option Each Document Contains a Variable Number of Pages if you want each Fax to be assembled into a single document (with each page of the Fax being one page of the document), or if you want the Fax to be assembled according to the rules set up in the Event Activator. Alternatively, select Force Document to Contain the Number of Pages and enter the number of pages desired (usually one) to break a single fax into multiple documents (usually each page becomes a single document).

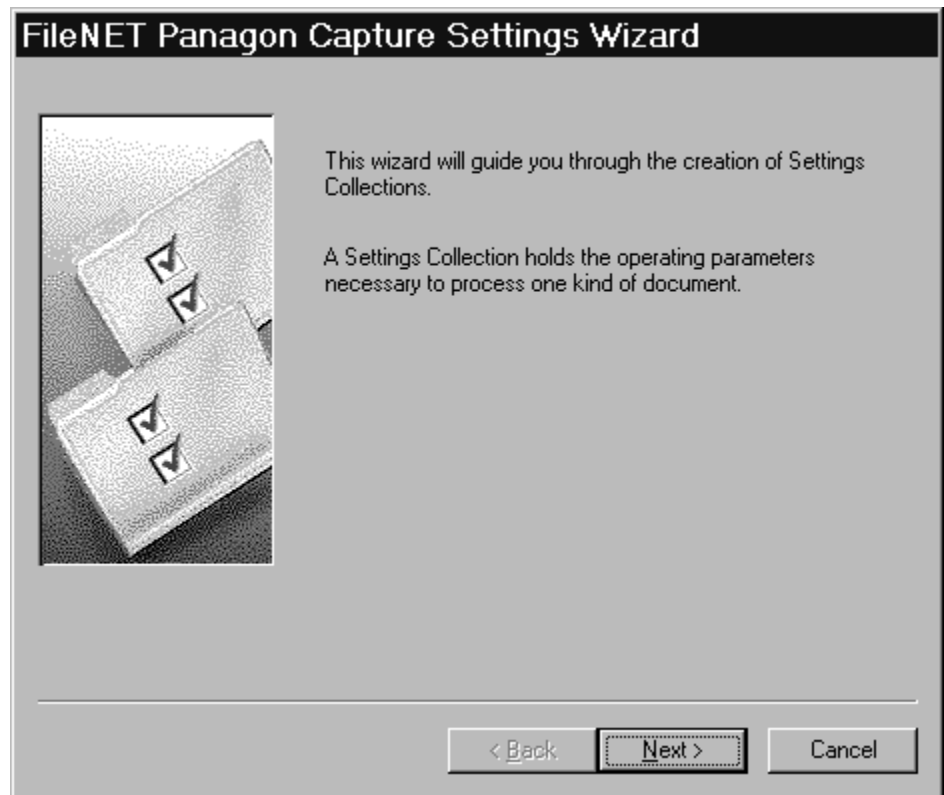
- Index** If you wish to set up autoindexing, configure the Index component accordingly. Check the option Processes Document Using Initial Values Above. This option must be checked to allow unattended operation. If it is not checked, operator invention will be required to index each document, thus preventing Fax Entry from running unattended and continuously.
- Commit** If you wish to commit, configure the Commit component accordingly.

Creating a Settings Collection for Panagon Fax Entry

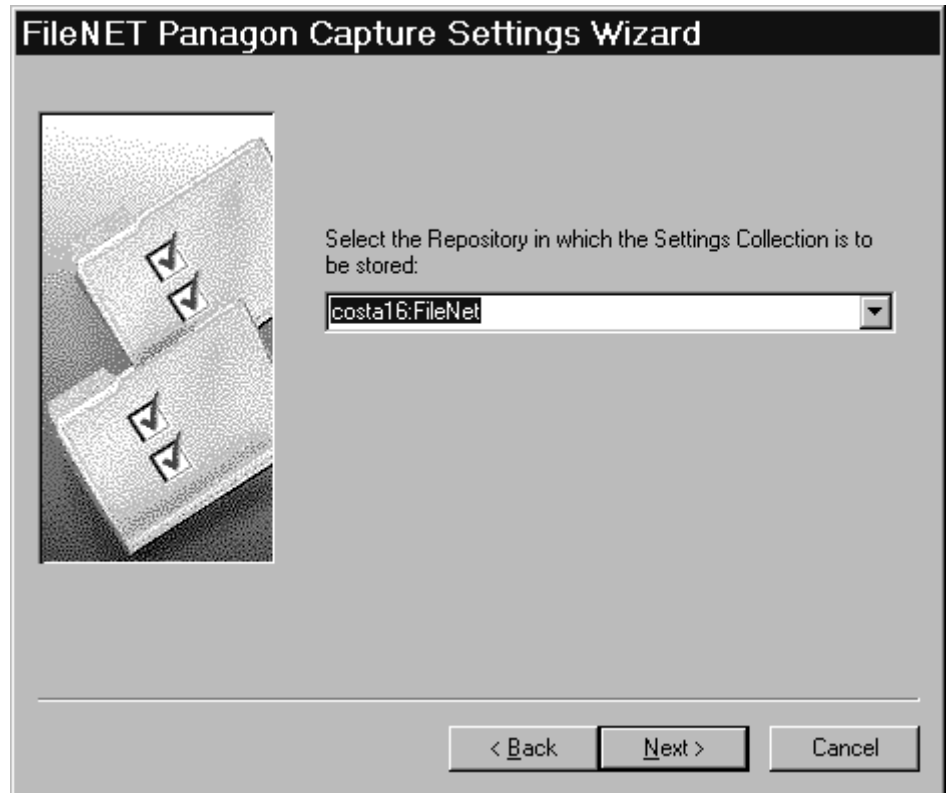
Before you can run Panagon Fax Entry, you must create settings collections to specify the many parameters available to you. Use the New Settings command to create a new settings collection, as follows:

- 1 Open the File menu and click the New command. Then select Settings from the secondary menu.

This starts the Settings wizard



- 2 When prompted for a repository, be sure to enter the name of the ID-MIS, not the Local Repository. (You cannot index or commit if you select the Local Repository.)



- 3 Enter a name for the settings collection in the name field.

FileNET Panagon Capture Settings Wizard

Do you want to:

- Edit an existing Settings Collection
- Define a new Settings Collection

Edit existing Settings Collection

Name:

Define new Settings Collection

Name:

Based on existing Settings Collection:

< Back Next > Cancel

- 4 When prompted for a Doc Class, use the document class that you want to place your Faxes/files in when you use Fax Entry. Select one of the document classes present on the remote (IDMIS) repository. (Available document classes appear in the scroll box.)

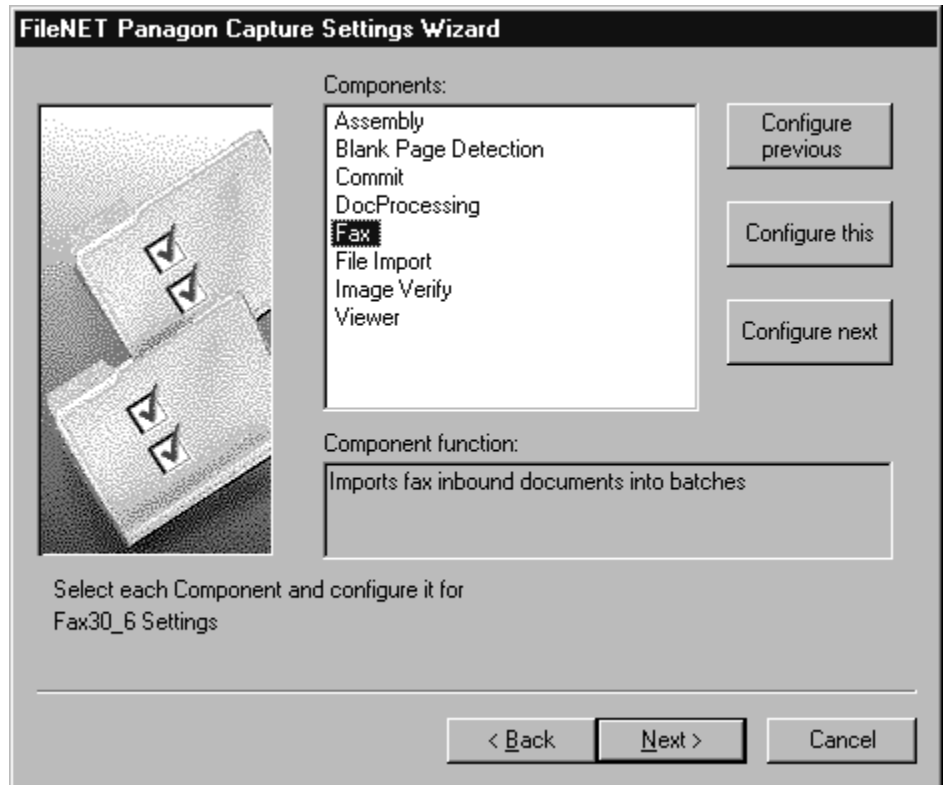
Tip Panagon Capture contains one large document class that incoming data defaults to. To minimize additional setup procedures, select this document class. Check with your System Administrator for this document class name.

Note that the document class that you select now cannot be changed later in the Fax Entry application. The document class that you select now will always be associated with this particular settings collection.

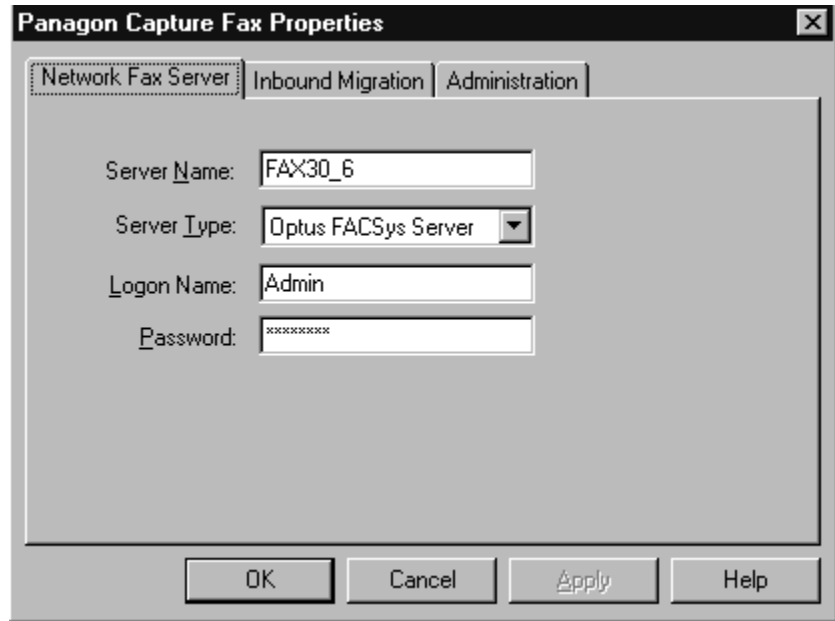
Write down the name of your document class at this point for future reference. When you choose your settings collection in the Fax Entry application, you will also be choosing your document class. Refer to [“Configuring Inbound Migration Parameters” on page 242](#).

You can also select other parameters at this time, as appropriate.

- 5 To select an installed component to edit its configuration, select Fax. Press the button, Configure this.



6 The Panagon Capture Fax Properties screen displays

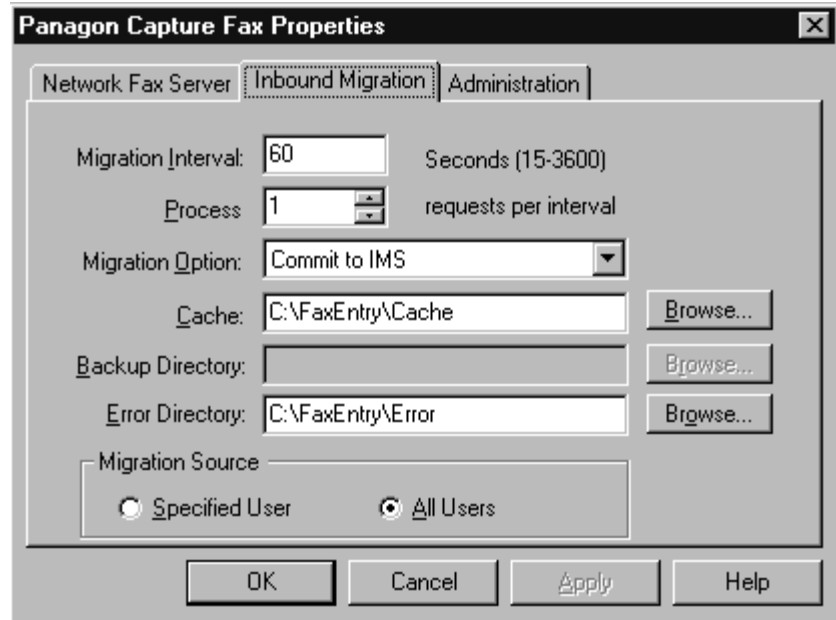


Press the Network Fax Server tab. Enter the same information that you specified when you installed your Optus FACSys Server.

If the Server Name, Server Type, Logon Name and Password are not configured correctly, Fax Entry may produce an error each time it tries to retrieve a fax.

When complete, press Apply.

- 7 Press the Inbound Migration tab.



Be sure to configure the Migration Source parameter. If you select All Users, you can communicate with all users on the Optus Network Fax server and, theoretically, migrate all fax jobs from all users.

When complete, press Apply.

Note Be aware that, while you can configure the following options in your settings collection, Fax Entry will override your settings and insert its own values. Note, however, that you must specify the Cache and Error Directory options in your settings collection to test your settings before using them in Fax Entry.

Migration Interval	Specifies how often to migrate files/faxes.
Process	Indicates the number of faxes/files to migrate in one group.
Migration Option	Specifies whether to Backup, Commit or both.
Backup Directory	Specifies where to save the backup files.
Cache	Indicates the working directory for the Fax component. Must be configured to test your settings collection.
Error Directory	Specifies where the Fax Component puts faxes that have errors. Must be configured to test your settings collection.

When you have configured the dialog as you wish, press OK.

- 8 Press the Administration tab.



When you have configured this dialog, press OK.

- 9 On the next screen, click the Next button and the Finish button to write the information to the repository.

When you have completed your settings collection, follow the instructions outlined [“Creating a Template Based on the Settings Collection” on page 231](#).

Creating a Template Based on the Settings Collection

A template provides a basis for a batch. A template defines the settings collections and the capture path associated with a given batch. Each batch has one and only one template. A template has one or more settings collection and, at most, one capture path associated with it. Refer to the *Online Help* for more information on template files.

Use the New Template command to create a template file for use on the IDMIS as follows:

- 1** Open the File menu and click the New command. Then select Template from the secondary menu. This starts the Template wizard.

- 2 When prompted for a repository, if you wish to index, be sure to enter the name of the IDMIS, not the Local Repository. You cannot index if the Local Repository is selected.



- 3 Enter a name for the template on the next screen.



The image shows a Windows-style dialog box titled "FileNET Panagon Capture Template Wizard". On the left side, there is a grayscale illustration of a fax machine with a document being processed. To the right of the illustration, the text "Do you want to:" is followed by two radio button options: "Edit an existing Template" (which is unselected) and "Define a new Template" (which is selected). Below these options, there are two main sections. The first section, titled "Edit existing Template", contains a "Name:" label followed by an empty text box and a dropdown arrow. The second section, titled "Define new Template", contains a "Name:" label followed by a text box containing the text "mytemplate". Below this is a "Based on existing Template:" label followed by an empty text box and a dropdown arrow. At the bottom of the dialog box, there are three buttons: "< Back", "Next >", and "Cancel".

- 4 When prompted to select a settings Collection, select the one you created in the previous step. (You can select additional settings, if they are available.) Click the Next button.



- 5 For this example, you do not have to associate a capture path with the template. However, if you are associating a capture path with the template, enter the name of the capture path and click the Next button. If you are not associating a capture path with the template, leave the field blank and click the Next button.

For additional information on capture paths, settings collections, templates, and other related subjects, refer to the [*Panagon Capture Planning and Configuration Guide*](#).

- 6 Click Finish to exit the Template wizard. The template is stored in the Template folder within the Config node on the repository.

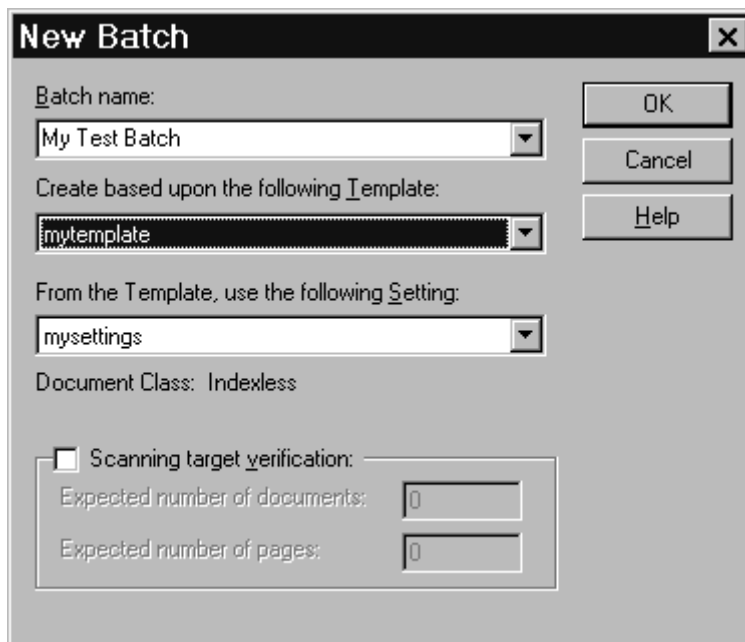
Create a New Batch Based on the Template

Once you have created a template, you can use it as the basis for the batch. When you create a batch, the batch inherits all of the configuration settings that are defined for the template. Refer to the *Online Help* for more information on how to change configuration settings for a batch or a template.

Use the New Batch command to create a new batch as follows:

- 1 Select a folder from the Tree View. (Do not select a folder within the Config node unless you are going to delete the batch when you are done.)
- 2 Open the Edit menu and click the New Batch command to create a new batch. This new batch will be based on a document class from your repository. Specify the New Batch using the New Batch dialog box as follows:
 - a Enter a name for the batch, or leave the batch name field blank to automatically name the batch. (Contact your IDMISS system administrator for batch naming restrictions on your system.)
 - b Specify the template to use as a basis for the batch. Select the template you created in Step 2, above, from the list.
 - c Select the settings collection you created as the Default Settings collection.

- 3 Click OK to create the batch.



The screenshot shows a dialog box titled "New Batch" with a close button (X) in the top right corner. The dialog contains the following fields and controls:

- Batch name:** A text box containing "My Test Batch" with a dropdown arrow on the right.
- Create based upon the following Template:** A dropdown menu showing "mytemplate".
- From the Template, use the following Setting:** A dropdown menu showing "mysettings".
- Document Class:** A text box containing "Indexless".
- Scanning target verification:** A checkbox that is currently unchecked.
- Expected number of documents:** A text box containing "0".
- Expected number of pages:** A text box containing "0".

On the right side of the dialog, there are three buttons: "OK", "Cancel", and "Help".

Testing Your Settings Collection and Template

If the options in your settings collection are not configured properly, the Fax Component will not be able to retrieve faxes from the fax server and Fax Entry may produce an error each time it tries to retrieve faxes. For this reason, test the settings collection and template in Panagon ad-hock mode before using them in Fax Entry.

Note that you set the Cache and Error Directory options in the settings collection in order to test the Settings. As previously noted, however, those options will be ignored when Fax Entry is run. For the list of options in the settings collection that Fax Entry will override, see the [“Note” on page 229](#).

Automatic Startup

You normally start the Fax Entry when you want to accept inbound faxes through Panagon Fax. Therefore, we recommend that you move the Fax Entry program icon (labeled Faxentry) from the Fax Entry program group to the Startup program group. Startup is located in the Programs group in the Start taskbar. For more information, refer to your Windows NT documentation.

When the Fax Entry icon is in your Startup group, Fax Entry starts automatically each time you start Windows NT.

Opening the Configuration Dialog Box

To start the Fax Entry, select the Faxentry icon in the FileNET Panagon Capture program group.

- If this is the first time you are invoking the Fax Entry application, the Fax Entry System Configuration dialog box displays.
- If you previously configured the Fax Entry, the main application window displays rather than the configuration dialog box. If you want to adjust parameter values, use the options in the Configuration menu to access the Configuration dialog boxes.

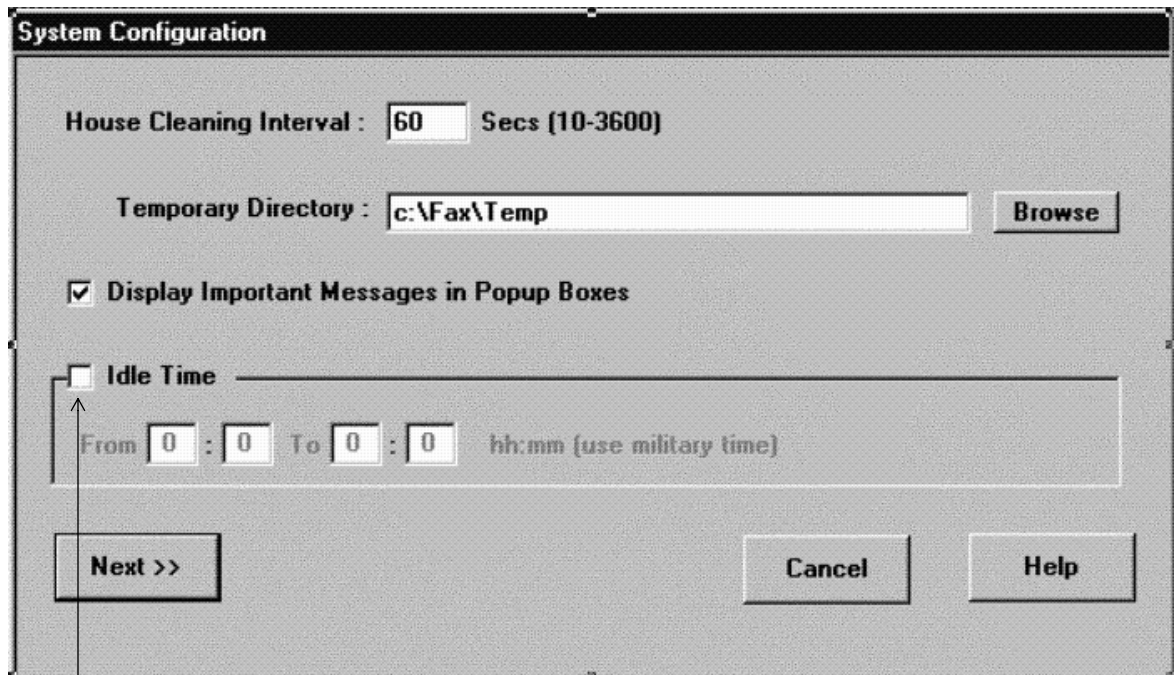
Note

The screen samples on the following pages illustrate the dialog boxes that a user sees after the configuration process has been completed. These screens can be accessed using the options in the Configuration menu.

Configuring System Parameters

Use the System Configuration dialog box to configure system parameters. System parameters include fields that define the Fax Entry system values. Options are available in the dialog box that allow you to configure system parameters.

An available option is Idle Time. Use this option if you want to back up the IDMIS without having to shut down the Fax Entry application. You can render Fax Entry idle during the time in which the IDMIS backup takes place.



Idle Time Option

If you enable the Idle Time option, you must enter a time period in the From/To area. During the time period specified in this area, the Fax Entry application is idle. When the period ends, the application migrates inbound faxes to the IDMIS again. The time period remains effective during the time period that you entered until the Idle Time option is reset.

The idle time must be entered in hh:mm format and in Military Time format. For example, if you want Fax Entry to be idle from 9:00 a.m. to 1:00 p.m., enter the time period From 09:00 a.m. To 13:00 p.m. If it is to be idle from 9:15 p.m. to 11:30 p.m., enter the time period From 21:15 To 23:30. If it is to be idle from 10:00 p.m. to 2:00 a.m., enter the time period From 22:00 To 26:00.

The maximum time period allowed is 24 hours. The idle time period cannot be equal to or greater than 24 hours (the Fax Entry application would be constantly idle). If you enter an invalid time period, an error message displays, and you must enter a valid time period in the From and To fields.

For more information on field definitions in this dialog box, refer to the *Panagon Fax Entry Online Help*.

After configuring the parameters in the System Configuration dialog box, proceed with one of the following steps:

- If you are a first-time user, click the Next button to display the Inbound Migration Configuration dialog box and proceed to the section [“Configuring Inbound Migration Parameters” on page 242](#).
- If you are not a first-time user, click OK to exit the dialog box.

Configuring Inbound Migration Parameters

Use the Inbound Migration Configuration dialog box to set up the automatic processing for inbound faxes.

The setup specifies whether faxes will be committed to the IDMIS and/or written to a local or network drive, directory designations, batch specifications, as well as the Batch Template and Batch Settings that were created during the Panagon Capture installation.

Your Batch Settings contain the Document Class that you designated when you created your settings collection and templates. Refer to [“Creating a Settings Collection for Panagon Fax Entry” on page 222](#).

For field definitions, refer to the *Fax Entry Online Help*.

Inbound Migration Configuration

Enable Inbound Migration

Migration Interval : Secs (10-3600)

Requests Per Migration : Requests (1-20)

Migration Option :

Backup Directory :

Cache Directory :

Error Directory :

Batch Prefix :

Batch Folder :

Batch Template :

Batch Settings :

DocProcessing : Run DocProcessing Before Event Activator
 Run DocProcessing After Assembly

Batch Disposition :

After configuring the fields in the Inbound Migration Configuration dialog box, proceed with one of the following steps:

- If you are a first-time user, click the Next button to display the File Migration Configuration dialog box and proceed to the section [“Configuring Inbound Migration Parameters” on page 242.](#)
- If you are not a first-time user, click OK to exit the dialog box.

Note If the backup directory or other directories that you specified do not exist, a dialog box asks if you want to create the directory. Click the Yes button.

Configuring File Migration Parameters

Use the File Migration Configuration dialog box to automatically process any files that reside in the directory specified in the File Migration Path field. You can process any file, including journal files generated by the Fax Manager, Panagon Fax Entry activity trace files, or other files on the Panagon Fax server's local drives or mapped network drives.

The File Migration Configuration dialog box specifies whether faxes will be committed to the IDMIS and moved to a Local or BES Repository, and/or written to a local or network drive. It also specifies directory designations, batch specifications, as well as the Batch Template and Batch Settings that were created during the Panagon Capture installation.

For field definitions, refer to the *Panagon Fax Manager Online Help*.

File Migration Configuration

Enable File Migration

Migration Interval : **Secs (10-3600)**

Files Per Migration : **Files (1-20)**

File Migration Path : **Browse**

Migration Option :

Backup Directory : **Browse**

Batch Prefix :

Batch Folder : **Browse**

Batch Template :

Batch Settings :

DocProcessing : *Run DocProcessing Before Event Activator*
 Run DocProcessing After Assembly

Batch Disposition :

OK **Cancel** **Help**

After configuring the fields in the File Migration Configuration dialog box, perform one of the following steps:

- If you are a first-time user, click the Next button to display the Journal Migration Configuration dialog box and proceed to the section [“Configuring Journal Migration Parameters” on page 248.](#)
- If you are not a first-time user, click OK to exit the dialog box.

Configuring Journal Migration Parameters

Use the Journal Migration Configuration dialog box to automatically process journal log files that reside in the directory specified in the Journal File Name field.

The Journal Migration Configuration dialog box specifies whether the journal log will be committed to the IDMIS and/or written to a local or network drive, directory designations, batch specifications, as well as the Batch Template and Batch Settings that were created during the Panagon Capture installation.

Journal Migration Configuration

Enable Journal Migration

Migration Interval : 300 Minutes (10-3600)

Lines Per Page : 40 Lines (10-200)

Migration Option : Backup And Commit

Backup Directory : c:\Fax\backup

Batch Prefix : WFF

Batch Folder : costa16:FileNet:/bills

Batch Template : 45801 Template

Batch Settings : 45801 Settings

Batch Disposition : Leave Batch Un-Indexed

Max Journal Record Count : 500 Entries (100-5000)

Journal File Name : c:\fns_w_loc\tmp\FEJrn.log

<< Prev Next >> Help

For field definitions, refer to the *Panagon Fax Manager Online Help*.

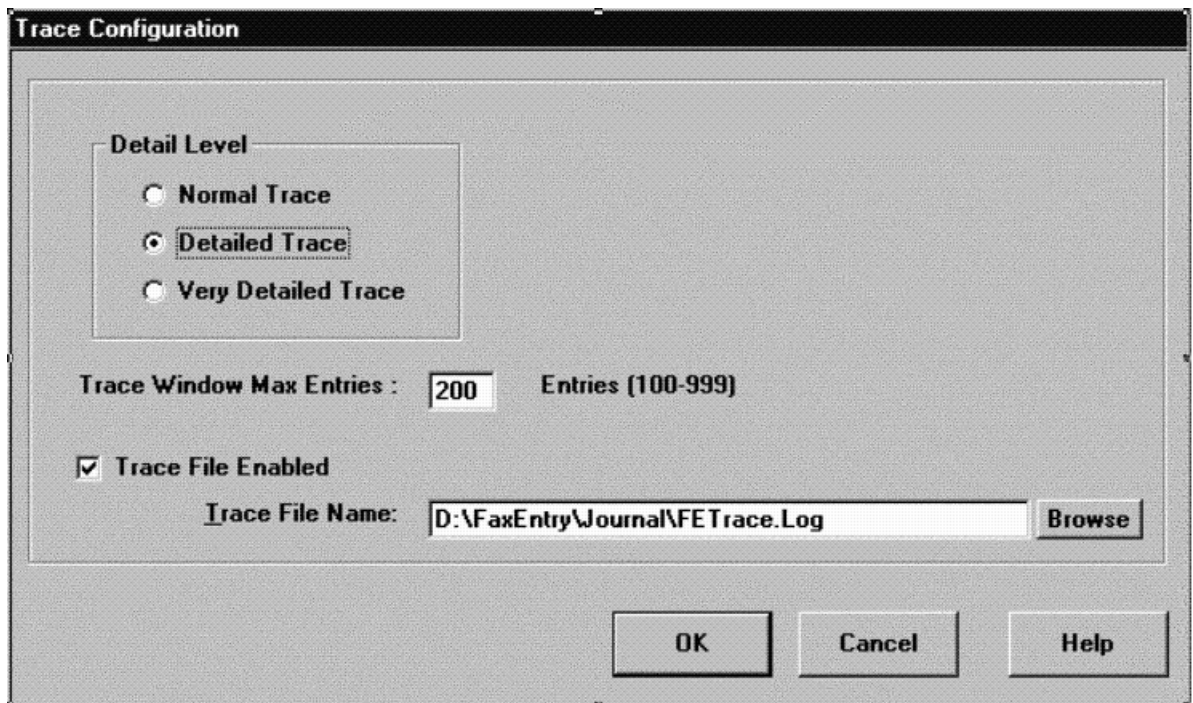
After configuring the parameters in the Journal Migration Configuration dialog box, perform one of the following steps:

- If you are a first-time user, click the Next button to display the Traces Configuration dialog box and proceed to the section [“Configuring Trace Parameters” on page 251](#).
- If you are not a first-time user, click OK to exit the dialog box.

Configuring Trace Parameters

Use the Trace Configuration dialog box to enable an automatic trace of the Fax Entry activities. Trace data is recorded in a specified file. You can determine what type of activity to trace and how much detail to record.

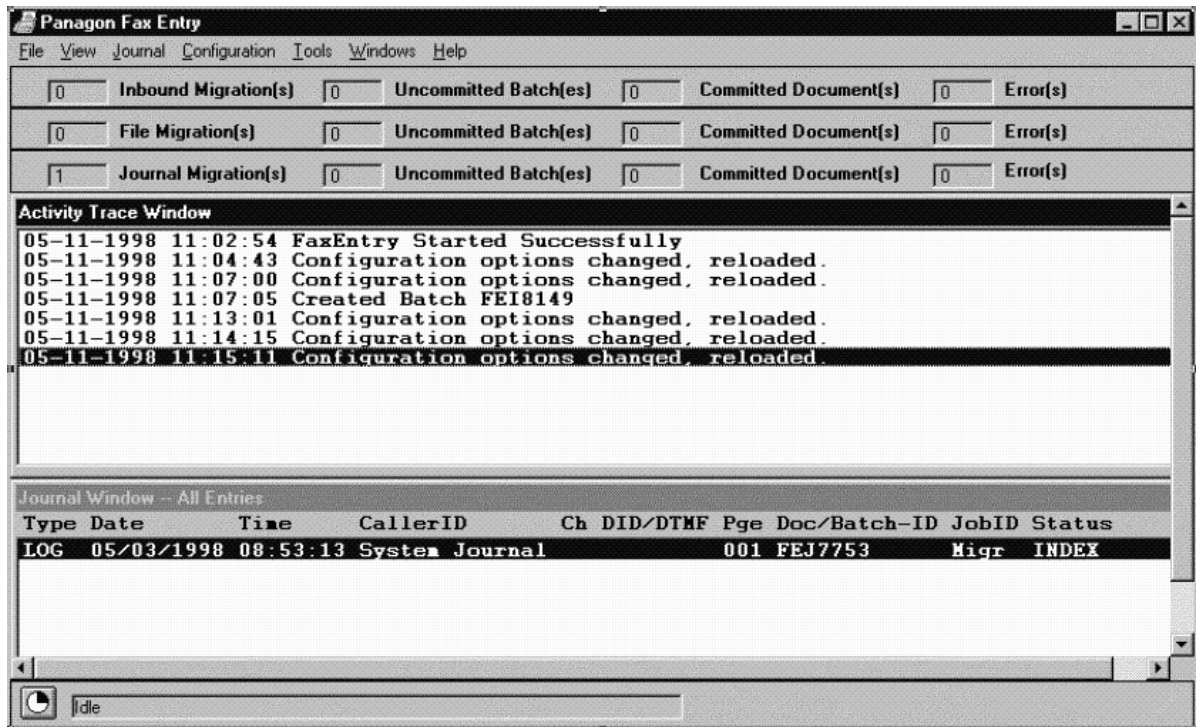
For field definitions, refer to the *Panagon Fax Entry Online Help*.



After configuring fields in the Trace Configuration dialog box, click OK (this applies to all users ---first-time and otherwise).

Saving Parameter Values

When the fields in the Fax Entry configuration dialog boxes are satisfactorily configured, click OK at the bottom of the dialog box. The main Fax Entry window displays. The following window indicates that Fax Entry started successfully.



For details on the main window, refer to the *Panagon Fax Entry Online Help* or the [Panagon Fax User's Guide](#) version 2.0.

Appendix A - Problem Reporting

If you have a problem you cannot resolve, remote support is available as part of maintenance provided to registered sites. To ensure quick resolution of your problem, be prepared to provide the information or answer the questions in the following form. After initiating a service call through the customer response center, you may be asked to fax the information.

Fax Server Problem Report Form

Customer Information:

Company name: _____ Date: _____

Site ID: _____ Your name: _____

Phone: _____

Problem Description:

Describe the problem: _____

Does the problem occur when only the Fax Server is running? Yes No

Does the problem occur using original configuration files? Yes No

Can the problem be reproduced?

Frequency of problem (how often): _____

Impact of problem: Critical Serious Annoyance

Is there a workaround?

If yes, describe the workaround: _____

Describe the state of the Fax Server screen: _____

Error messages displayed on the Fax Server: _____

Error message on FileNET IDMIS server: _____

Errors logged in FileNET IDMIS server error logs: _____

Hardware:

System:

Manufacturer: _____

Model: _____

Processor used: Pentium Other: _____

Processor speed: _____ MHz

Additional memory (past 1 MB): _____

Network:

Network card Ethernet Token Ring

Model: _____

If Other, describe: _____

Settings for IRQ, I/O port address, shared memory, and DMA channel, if applicable:

Fax Board:

Board # _____	Board Type	<input type="checkbox"/> CP	<input type="checkbox"/> CP100	
		<input type="checkbox"/> CPi	<input type="checkbox"/> CP4/LSI	
Board # _____	Board Type	<input type="checkbox"/> CP	<input type="checkbox"/> CPi	<input type="checkbox"/> CPXPi
		<input type="checkbox"/> CPD	<input type="checkbox"/> CP100	<input type="checkbox"/> CP120
		<input type="checkbox"/> CP4/T1	<input type="checkbox"/> CP4/LSI	
Board # _____	Board Type	<input type="checkbox"/> CP	<input type="checkbox"/> CPi	<input type="checkbox"/> CPXPi
		<input type="checkbox"/> CPD	<input type="checkbox"/> CP100	<input type="checkbox"/> CP120
		<input type="checkbox"/> CP4/T1	<input type="checkbox"/> CP4/LSI	
Board # _____	Board Type	<input type="checkbox"/> CP	<input type="checkbox"/> CPi	<input type="checkbox"/> CPXPi
		<input type="checkbox"/> CPD	<input type="checkbox"/> CP100	<input type="checkbox"/> CP120
		<input type="checkbox"/> CP4/T1	<input type="checkbox"/> CP4/LSI	

Other Services:

Are any third-party cards installed? If so, please list them:

Software:

Panagon Fax Release: _____ FileNET IDMIS System Release: _____

Optus FACSys Release: _____

Windows NT Release (4.0 or later): _____

Please specify any other software installed and running concurrently with Panagon Business System software:

Additional Information For a Specific Problem

Be prepared to send copies of the files listed in the following table.

If You Have a Problem with...	Send Copies of These Files...
Fax server installation	<ul style="list-style-type: none"> • C:\FAXINST.LOG
Transmitting a particular image file to a remote site	<ul style="list-style-type: none"> • The image file • The actual faxed page (if possible) • Verbose log • All of these files: \FNSW_LOC\TMP*.2PS
The fax server hanging	<ul style="list-style-type: none"> • The IDMIS system log file
Adding an on-image note	<ul style="list-style-type: none"> • The actual faxed page (if possible) • All files related to the trouble request in the C:\FNSW_LOC\MIGRATE directory
Document committal	<ul style="list-style-type: none"> • Activity trace file: x:\FaxEntry\Journal\FETrace.log • Fax Manager Journal Log file • Panagon Fax Entry Journal Log file x:\FaxEntry\Journal\FEJrn.log

Appendix B- Editing the Registry Database

The Windows NT Registry database contains configuration information for both Windows NT and Panagon Fax software components. The Registry database replaces files such as PCPS.CFG that held configuration data for earlier Panagon Fax releases.

This appendix describes procedures for:

- Starting the Windows NT Registry Editor
- Setting Up Windows NT Automatic Logon
- Securing the Panagon Fax Server

About the Windows NT Registry Database

The Registry database is organized in a tree structure of keys and values. For example, all configuration data specific to the print server is stored in a key called HKEY_LOCAL_MACHINE. Within HKEY_LOCAL_MACHINE are subkeys for hardware, software, security, and other categories of configuration data. The locations of the Panagon Fax and Windows NT data are:

- HKEY_LOCAL_MACHINE\SOFTWARE\FileNET
- HKEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Windows NT

Within the FileNET key are subkeys that hold specific categories of configuration data. Within the subkeys are values. Each value holds one specific item of configuration data.

Most Panagon Fax and Windows NT configuration data that you might want to change can be entered through interfaces. For both Panagon Fax and Windows NT, however, the Registry database holds some configuration data that you cannot access through installation or configuration programs. Changing such configuration data requires using the Windows NT Registry Editor utility to edit the Registry database directly.

CAUTION

Editing the Registry database is recommended for experienced Windows NT users only. Incorrect entries in the database causes system errors that can prevent the system from restarting. Make sure you have an Emergency Repair Disk before performing the procedures in this section. Do not change any values in the Registry database other than those described in this appendix.

Starting the Windows NT Registry Editor

You must be logged on to Windows NT with Administrator rights and permissions to run the Registry Editor. Your Windows NT system administrator determines each user's rights and permissions. Windows NT system administrators should refer to Windows NT documentation for more information.

To start the Registry Editor utility, perform the following steps.

Note Depending on your network configuration and the configuration of the fax server, you might not be able to run the Registry Editor on the fax server.

If the Registry Editor can run on the fax server, perform the following steps at the fax server. Otherwise, perform the steps at a PC that can both run the Registry Editor and administer the fax server's security.

- 1 At the DOS command prompt or in the Windows NT Command Line box, type:

<x>:winnt35\regedt32

where <x> represents the drive where your Windows files reside.

- 2 Press the Enter key. If you are running the Registry Editor on the fax server, proceed to step 4; otherwise, proceed to step 3.
- 3 If you are running the Registry Editor on a PC other than the fax server, perform the following steps to attach to the fax server:
 - a From the Registry menu, choose Select Computer.
 - b In the Select Computer dialog box, choose the fax server by clicking its icon.
 - c Click OK to close the Select Computer dialog box.
- 4 Windows for various Registry keys display. Select the window titled HKEY_LOCAL_MACHINE on Local Machine.

The window graphically depicts a tree structure of the subkeys within HKEY_LOCAL_MACHINE.

- 5 We recommend that you back up the Registry database's SOFTWARE key before making any changes to the database. Two backup methods are available:
- a Use the Windows NT Backup utility to back up either the entire database or only the SOFTWARE key. For more information, refer to your Microsoft Windows NT documentation.
 - b Use the Registry Editor's Save Key to back up only the SOFTWARE key:
 - a Highlight the SOFTWARE key.
 - b From the Registry menu, select Save Key.
 - c In the Save Key dialog box, enter the path and filename information to indicate where you want the backup saved.

After successfully starting the Registry Editor and backing up the SOFTWARE key, proceed to the following sections in this appendix:

- ["Setting Up Windows NT Automatic Logon" on page 264.](#)
- ["Securing the Panagon Fax Server" on page 266.](#)

Setting Up Windows NT Automatic Logon

There are system security issues associated with the Windows NT automatic logon feature. Before performing this procedure, read the section [“Configuring Windows NT for Automatic Logon” on page 59](#).

- 1 Perform the procedure described in the section [“Starting the Windows NT Registry Editor” on page 261](#).
- 2 From the HKEY_LOCAL_MACHINE window, move to the key where the Windows NT logon information resides:

SOFTWARE\Microsoft\Windows NT\CurrentVersion\Winlogon

- 3 To enable the automatic logon functionality, the three values listed in the following table must be present in the Winlogon key. The values must be set as shown.

Value	Setting
DefaultUserName	The name of the user already defined in Windows NT that will be logged on automatically when Windows NT starts up.
DefaultPassword	The password defined for the user you entered in the DefaultUserName field.
AutoAdminLogon	1

- To add a value, proceed to step 4.
- To change the setting of a value, proceed to step 5.
- If all values are set correctly, proceed to step 6.

CAUTION

Incorrect entries in the Registry database cause system errors. Do not change or add any values in the Registry database other than those previously listed.

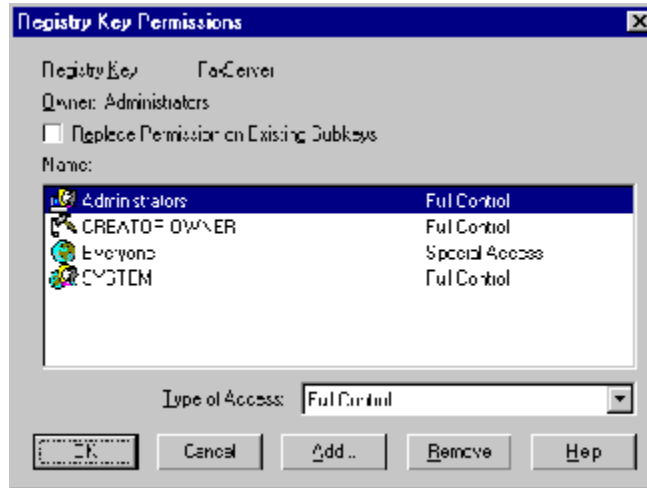
- 4 To add a value:
 - a From the Edit menu, choose Add Value. The Add Value dialog box displays.
 - b In the Value Name field, enter the appropriate name (DefaultUserName, DefaultPassword, or AutoAdminLogon).
 - c In the Data Type field, select REG_SZ.
 - d Click OK. The String Editor dialog box displays.
 - e Enter the appropriate text, according to the table in [Step 3 on page 264](#).
 - f Click OK. After the String Editor dialog box closes, the value you added displays in the list of Winlogon values.
- 5 To change the setting of the DefaultUserName, DefaultPassword, or AutoAdminLogon values:
 - a Highlight the value name.
 - b From the Edit menu, choose String.
 - c In the String Editor dialog box, enter the appropriate text. Refer to the table in [Step 3 on page 264](#) for details.

- d Click OK. After the String Editor dialog box closes, the list of Winlogon values updates to reflect your change.
- 6 From the Registry menu, choose Exit to close the Registry Editor utility.

Securing the Panagon Fax Server

Follow the procedure described in this section to limit a user group's edit-access (the ability to make changes) to the Panagon Fax configuration. Limiting the number of users with edit-access might avoid unintentional or incorrect entries in the Panagon Fax configuration.

- 1 Perform the procedure in the section [“Starting the Windows NT Registry Editor” on page 261](#).
- 2 From the HKEY_LOCAL_MACHINE window, perform the following steps:
 - a Double-click the SOFTWARE key.
 - b Within the SOFTWARE key, double-click the FileNET key.
 - c Within the FileNET key, highlight the FaxServer key (do not double-click). FaxServer is the key where Panagon Fax configuration data is stored.
- 3 With the FaxServer key highlighted, choose Security from the Registry Editor menu bar.
- 4 From the Security menu, choose Permissions. The Registry Key Permissions dialog box displays.

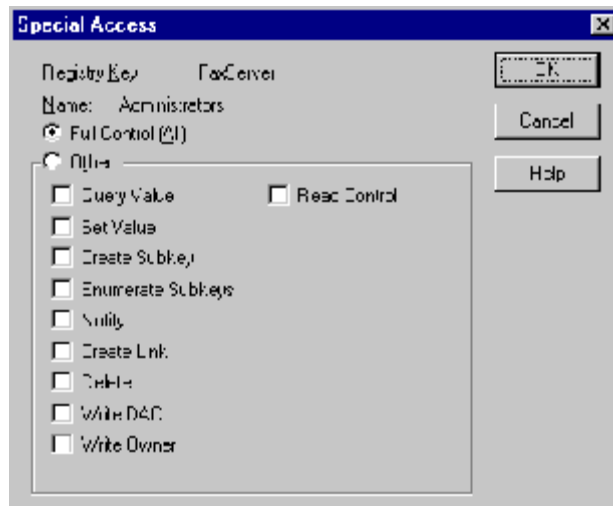


- 5 The Name list box displays the name of each user group that can access the FaxServer key. All Panagon Fax users must belong to a user group with access to the FaxServer key.

Next to each user group's name is its currently defined type of access: Full Control, Read, or Special Access. For more information about the types of access, refer to your Windows NT documentation.

- User groups with Full Control can view and edit the Panagon Fax configuration. To disable the user group's ability to edit the Panagon Fax configuration, change the type of access to Read or Special Access.
- User groups with Read access can view the Panagon Fax configuration, but they cannot make changes. Since edit-access is already restricted, no further changes are necessary; proceed to [Step 9 on page 268](#).

- User groups with Special Access have customized permissions that range between Read and Full Control access, possibly including edit-access to the Panagon Fax configuration. To check the edit-access permission, proceed to [Step 6 on page 268](#).
- 6 In the Name list box, double-click the name of the user group whose access you want to edit. The Special Access dialog box displays.



- 7 In the Other section of the dialog box, the Set Value option controls the edit-access permission to the Panagon Fax configuration. If necessary, clear the Set Value option to disable edit-access permission.

For information on the other options available in the Other section of the dialog box, refer to the Windows NT online Help.

- 8 Click OK to close the Special Access dialog box.
- 9 Click OK to close the Registry Key Permissions dialog box.

- 10** Repeat these steps for the Panagon Print server.
- 11** From the Registry menu, choose Exit to close the Registry Editor utility.

Appendix C - Installing pcANYWHERE32

Using the pc-ANYWHERE32 application, FileNET support staff can dial in to the fax server and manipulate its controls from their remote site to diagnose and resolve problems.

Note FileNET licenses pcANYWHERE32 from Symantec Corporation for use with FileNET products. This license does not extend to FileNET customers. To use pcANYWHERE32, you must obtain a license for this product from Symantec Corporation.

In addition, the fax server must be equipped with an external or internal modem. The fax cards used with Panagon Fax are dedicated to fax operations and cannot be used to perform data communication activities with the pc-ANYWHERE32 application.

Before You Begin

Before you install the pc-ANYWHERE32 application on the fax server, perform the following procedure.

- 1 Install TCP/IP and FTP on the fax server. For more information, refer to your Windows NT documentation.
- 2 Install and test all Panagon Fax software and hardware components as described in this Installation Guide. Do not try to install pcANYWHERE32 before your fax server is fully functional with Panagon Fax 2.0.

- 3 Install and test the communications hardware you have elected to use in the fax server. For more information, refer to the manufacturer's documentation.

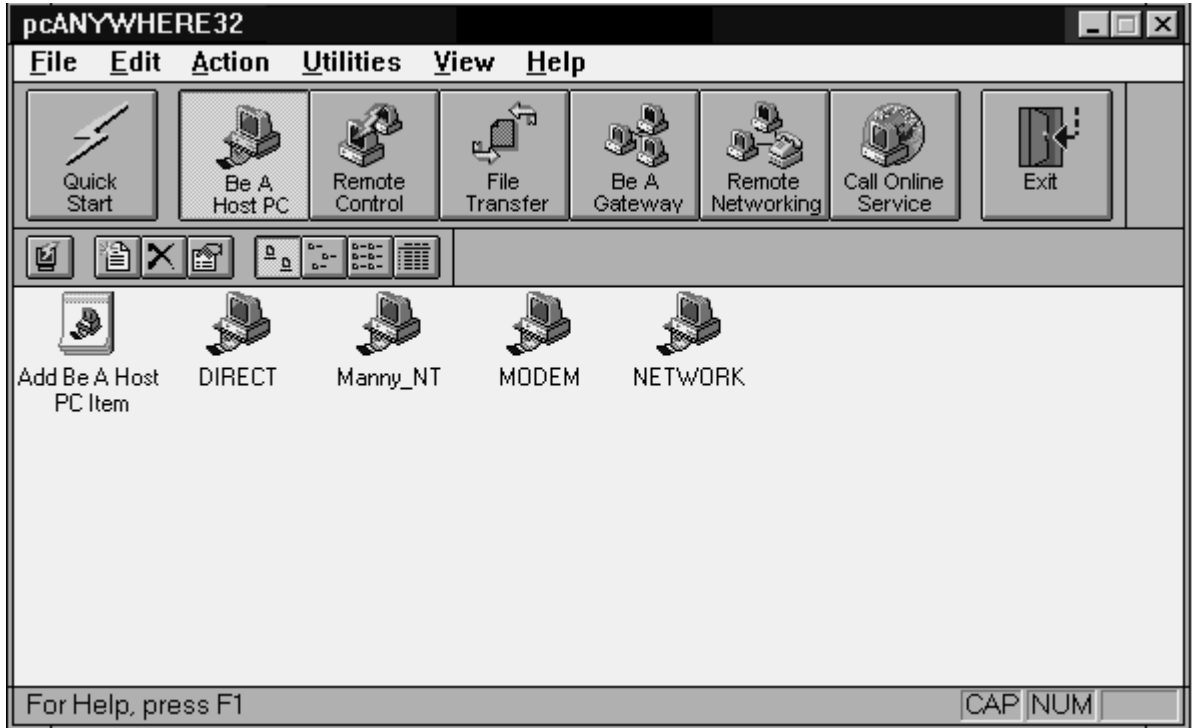
Installing pcANYWHERE32 TCP Remote Logon Services

- 1 Follow the procedures in the *pcANYWHERE32 User's Guide* to install pcANYWHERE32 on the fax server.

Accept the installation program defaults for the modem and direct cable connections.

Note Although the installation program defaults may not be used directly on the server you are configuring, accept them. Accepting these defaults should not affect the outcome of the configuration.

- 2 When the installation is complete, start the pcANYWHERE32 application. The pcANYWHERE32 window displays.

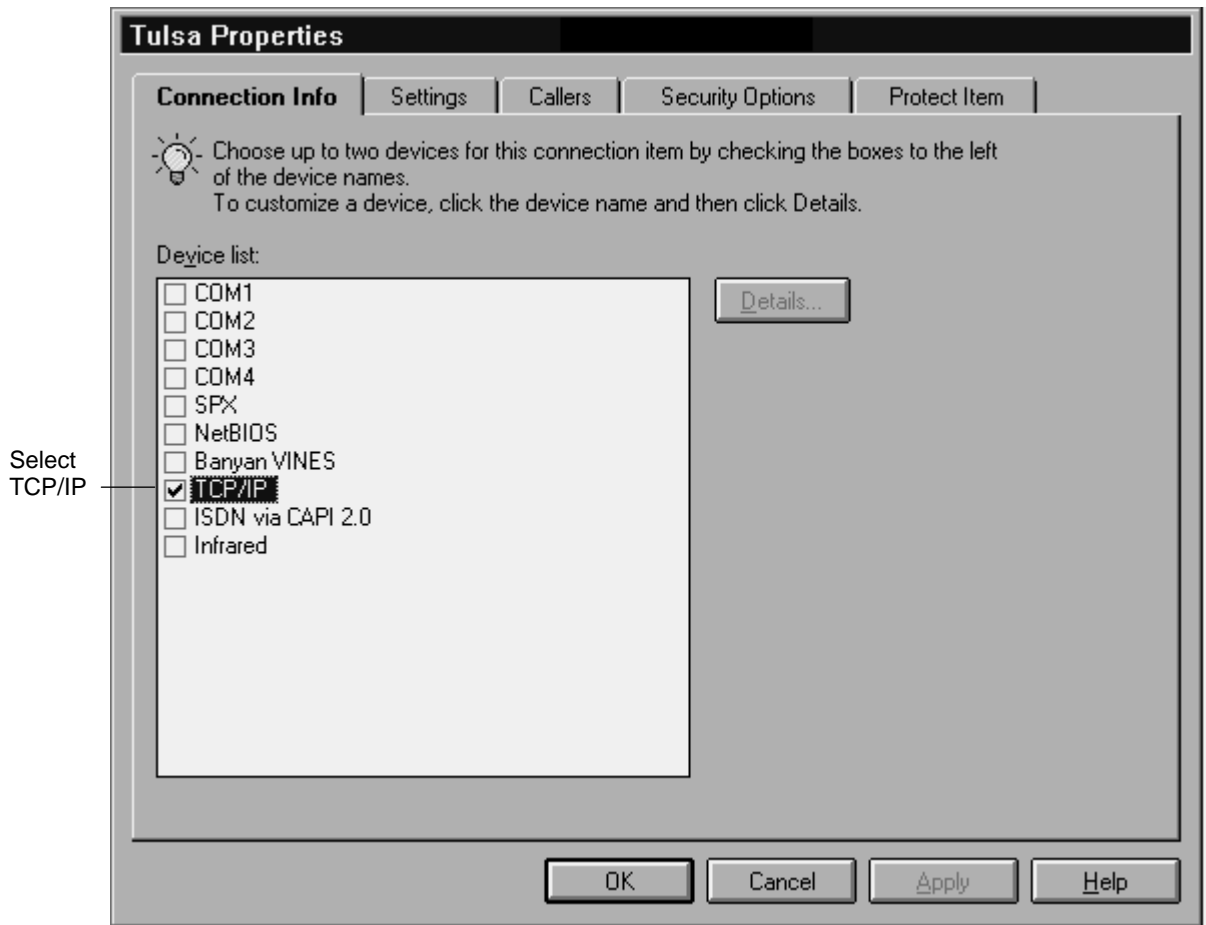


- 3 At the top of the pcANYWHERE32 window, click the Be A Host PC button.

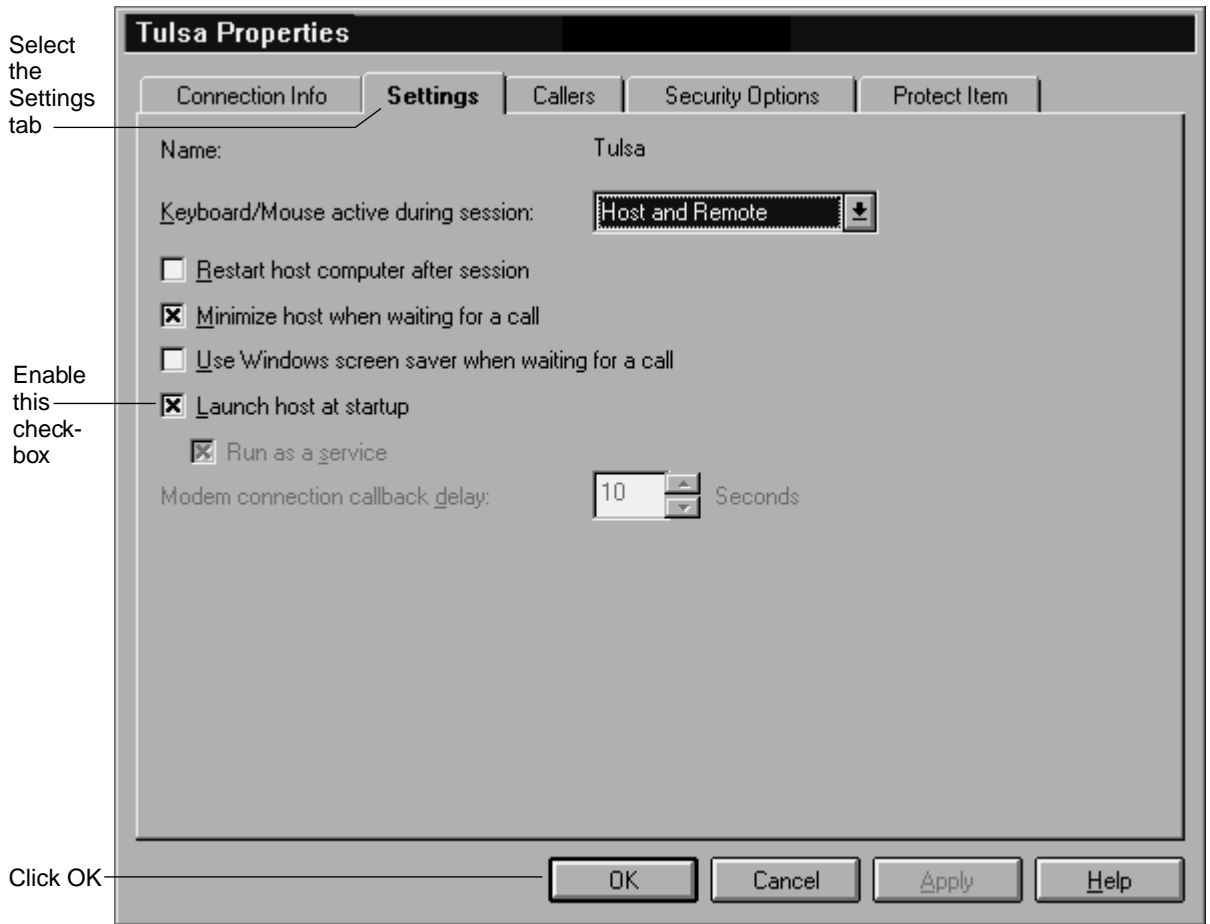
Note Since this server will be controlled by a remote PC, it is considered a host.

- 4 Select the NETWORK icon and right-click it.
- 5 When you right-click the NETWORK icon, a pop-up window displays. Click the Properties option in this window.

The Properties dialog box displays, with the Connection Info tab active by default.



- 6 In the Device list box of the Connection Info tab, select TCP/IP.
- 7 Select the Settings tab in the Properties dialog box.



- 8 To have the pcANYWHERE32 host start when NT starts, enable (check) the checkbox “Launch host at startup”, and click OK.
- 9 From the taskbar, click the Start button and select Shut Down to shut down and reboot the server.

The Shut Down Windows dialog box displays.

- 10** Select the radio button Restart the computer and click Yes.

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