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# Fax User's Guide

Release 2.0

9811095-001

**July 1998** 

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## About This Manual

This Panagon Fax User's Guide, publication number 9811095-001. supports release 2.0 and subsequent releases of the FileNET Panagon Fax server software. This manual is written for the system administrator who is responsible for the operation and maintenance of the fax server.

The fax server connects to the FileNET system through Windows Networking software and runs under the Microsoft Windows® NT operating system, release 4.0. We assume that you have a working knowledge of Windows NT and general PC operations. For information about the hardware and software requirements for the fax server, see the Panagon Fax Installation Guide.

#### Release Notes

The Release Notes contain important information about Panagon Fax that may not be included in this manual, the *Panagon Fax Installation* Guide or the Online Help. The Release Notes display automatically during installation through the Windows Write or Notepad application.

#### What to Read First

If you're a new user to Panagon Fax, we recommend that you begin by reading the following chapter in this manual:

Chapter 1, "Overview," on page 22

Consult the other chapters for complete explanations and detailed reference material on each application.

#### **Related Publications**

Refer to the documentation listed in this section when you install and configure the Panagon Fax software.

#### Hardware Documentation

Refer to the manufacturer-supplied documentation for information on 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 to install and configure 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 documents listed, 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 IDM Image Services (IDMIS), refer to the following documentation.

- System Administrator's Handbook
- System Administrator's Companion (IDMIS Release 3.4.x and later)

#### **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
- WorkFlo Controls for Visual Basic Programmer's Guide

## **New Features or 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 fullyoperational 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 Inbound 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 Panagon Fax 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.)

Panagon Print 4.0 CD Outbound Fax:

Optus FACSys Fax Messaging Gateway

(Includes 10 client licenses. Is currently distributed on diskette, but scheduled for CD-Rom distribution.)

#### **Inbound Panagon Fax Support**

#### **Custom Visual Basic Panagon Fax Entry Program**

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" and "Configuring Panagon Fax Entry" in the Panagon Fax 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. For information to configure this option, refer to "Display Important Messages" on page 117.

#### **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 In-

bound faxes.

**Error Directory** Indicates the directory to contain failed inbound

faxes.

Batch Prefix Specifies the prefix that Panagon Fax Entry as-

signs 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 dur-

> ing 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 Acti-

> vator or after Assembly, as the user selects, if the Panagon Capture DocProcessing package

was purchased.

For additional information, refer to the chapters "Configuring Inbound Migration Parameters" and "Configuring File Migration Parameters" in the Panagon Fax Installation Guide.

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.

Specifies the Panagon Settings collection that Batch Settings

> will be used during processing. The Settings collection are created using the Panagon Capture

application.

For detailed information, refer to the chapters "Configuring Inbound Migration Parameters" and "Configuring File Migration Parameters" in the Panagon Fax Installation Guide. For definition information, refer to the Online Help.

To create Templates and Settings, refer to "Settings and Templates" in the Panagon Fax Installation Guide.

#### **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 as-

signs 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 dur-

ing 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 the chapter "Configuring Journal Migration Parameters" in the Panagon Fax Installation Guide. 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 the chapter "Configuring Journal Migration Parameters" in the Panagon Fax Installation Guide. For details, refer to the Online Help.

To create Templates and Settings, refer to the chapter "Settings and Templates" in the Panagon Fax Installation Guide.

#### **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" and "Configuring the Panagon Fax Manager" in the Panagon Fax Installation Guide.

## **Tips, Notes & CAUTIONs**

Throughout this manual, you will see messages designed to display important 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, please 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 telephone numbers to request information and to ask questions:

Local714.966.3412 Toll Free888.FNEDUC8 (888.363.3828)

## **Comments & Suggestions**

FileNET invites all customers to communicate with the Documentation. group on any question or comment related to FileNET manuals and online help. Fax, phone, mail, or email any question or comment to Mike Calvert at one of the numbers or addresses listed below. We guarantee a response to each communication within one week. Your suggestions help us improve the products we deliver.

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# Overview

Panagon Fax consists of a number of software components that interact with each other. These components make up the Panagon Fax system and are used to:

- Receive inbound FileNET images and migrate them to a FileNET IDMIS along with their indexing data.
- Transmit FileNET images retrieved from the IDMIS to a remote fax machine or fax server.
- Send or receive supported non-FileNET fax documents.
- Create journal logs that can be migrated to an IDMIS or backed up to a local or network drive.

The purpose of this chapter is to provide you with an overview of the functionality of these components. Understanding the function of these components within Panagon Fax will make managing inbound and outbound faxes easier.

For a more complete description of these components, including the system requirements needed to run them, refer to the Panagon Fax Installation Guide.

## Fax Terminology

Some terms in the Fax process warrant additional definition as used. Such terms are defined in the following sections.

#### **Images and Documents**

An inbound fax creates an image, just as a scanned page is an image. A document consists of one or more images. Images must be combined to form documents. This is called Assembly.

Initially, the FileNET system assigns a unique identification number called an image ID to each image or page. For example, the image IDs of a two-page document may be: 1294966183, 1294966184. The image ID is later used to determine the permanent document ID for the entire document after the document is committed.

Before committing a document, the system assigns a document sequence ID to each document within a batch, indicating the document's position in the batch. For example, Document Sequence IDs 1, 2, and 3 refer to the first, second, and third documents within one batch.

Later, when the document is committed to optical disk, FileNET assigns a unique document ID to the entire document, based on the image ID. For single-image documents, the image ID becomes the document id. For multi-image documents, the image ID of the first image in the document becomes the document ID for the entire document. For example, the document ID derived from the previous image ID example would be 1294966183. You can use a document ID in a query to locate the document.

#### Committal

Committal is the process of storing images and their index values. Writing index information to the database is called cataloging. Writing documents to optical disk is called migration. When you commit a batch, documents move from the Batch Entry Service (BES) cache on the IDMIS server to optical disk. Or, you can also commit a batch without migrating it to optical disk. Committal and migration options are discussed in detail in the WorkForce Desktop User's Guide.

#### **Document Class**

Document classes are profiles stored on IDMIS servers that provide a template for entering keywords while indexing a batch of documents. Document classes also provide information on read, write, and append/execute security privileges. Once a document is committed to storage media, operators retrieve it by entering its document ID or indexing keywords.

The system administrator creates a document class for each document type using the Database Maintenance application in the IDMIS. The document class is assigned when a template is created and used for a specific batch. Batches cannot be created without a document class and template.

When you set up a document class in Database Maintenance, you determine certain defaults for all documents in that class, such as media family name, whether to verify images, who can access the documents, and which indexes to use. Care in designing document classes is worthwhile as document classes cannot be deleted.

The components that are part of Panagon Capture use these document class settings as default values. However, if a Panagon Capture component has a different value than that defined in the document class, the value in the component takes precedence and is used for batch processing.

BES repositories have full access to all document classes defined on the IDMIS server. However, ODBC repositories (local repositories) cannot access document class information on BES. If you create a batch on an ODBC repository, you must manually enter the name of the document class the batch will use after it transfers to the BES for indexing and committal.

### Repositories

A repository is a database in which incoming files are stored. Panagon Capture supports two repository types: a BES (Batch Entry Services) repository (remote) and an ODBC (open database connectivity) local repository. BES repositories reside on FileNET IDMIS servers. ODBC repositories can be on the local drive or on a different server or workstation on the network.

When you create your settings collection and template in Panagon Capture for Fax, you must specify the repository in which your Settings collection and Template will be stored. The local ODBC repository is very similar to the BES repository with one major exception -- the local ODBC repository cannot access information about document classes. If a batch contains no document class information, the batch cannot be indexed or committed. Therefore, when you specify the repository in which your settings collection and template are to be stored, be sure to indicate the BES repository; you cannot index or commit if you select the ODBC local repository until you move the batch to the IDMIS repository.

#### Note

If you selected an ODBC repository and set the Batch Disposition option in any configuration dialog boxes to Index Batch but Leave Un-Committed or Index Batch and Commit, Fax Entry will return errors when trying to index or commit the batch.

When configuring Panagon Fax, if you select either of these Migration Options: Commit To IMS or Backup and Commit, faxes/files are committed to the IDMIS and moved to BES Repository for storage. For detailed information on BES repositories, refer to the *IDMIS System Administrator's Handbook*, "Cache Organization" section. BES repository is referred to as batch cache on the IDMIS.

#### **Repository Structure**

Repositories have a flexible hierarchical structure. The repository hierarchy can have as many folder levels as you wish. This allows you to structure the repositories to reflect the way you work.

#### Folders and Batches

Within a repository you can create folders and batches.

A folder is an object within a repository that works much like a paper folder. Folders can contain other folders or batches of documents. Folders are optional.

A batch is a set of similar documents that are processed through the document capture and document entry functions as a group. All documents in a batch must belong to the same document class and have the same indexing requirements. Batches are committed to the IDMIS as a group. After committal, the name assigned to the batch is discarded, since documents are individually retrieved through their document ID or indexing keywords.

Batches are required in the repository hierarchy. A file or fax must always be contained within a batch to be processed. Therefore, a repository must always contain batches.

When configuring Fax in the Inbound Migration Configuration, File Migration Configuration, and Journal Migration Configuration dialog boxes, you can specify the following about batches: Batch Prefix, Batch Folder, Batch Template, Batch Settings, and Batch Disposition.

#### Components

Panagon Capture consists of processing steps that are separate Active X (OCX) controls rather than pieces of an individual application. For example, scanning, assembly, image verification and indexing are separate controls rather than being parts of a monolithic scan application. These OCX controls are called components.

#### **Settings Collections**

When you create a settings collection, you specify the document class that is assigned to the settings collection. The document class defines the indexing requirements used when the batch is committed to storage media; each batch has an assigned document class. Therefore, when the operator uses a settings collection, the document class is selected automatically.

Settings collections are stored in repositories. By default, they are stored in a subfolder of the Config folder named Settings. You can change the path of the repository containing the settings collections through the Control Properties dialog box.

## **Templates**

Templates are stored with capture paths and settings collections in the CONFIG directory of a repository. The CONFIG directory path is set in the Control Properties dialog box. Templates contain information about the settings collection and, if your workflow is automated, the template also contains the name of the capture path.

## **Panagon Fax Components**

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.
- Send or receive supported 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. Refer to the Panagon Fax Installation Guide for installation and configuration.

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

Panagon Capture Application

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.

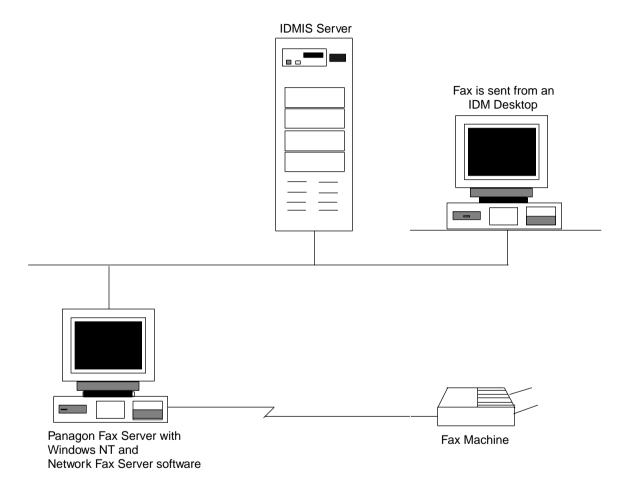
Ten FACSys client licenses and media are included and can be used to send and receive non-FileNET fax documents, if desired. The client software that is available as part of the Network Fax Server package provides fax functions such as phone book management, cover page generation, send function, and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

The FACSys client software is also used to administer the FACSys server from a remote station over the LAN.

The Panagon Fax outbound fax process functions as follows:

- A Fax request is sent from an IDM or equivalent workstation.
- IDMIS receives the fax request and queues it to Print Services.
- Panagon Fax services the Fax requests that are queued to Print Services.
- Panagon Fax sends the requests to the FACSys Gateway in Post-Script Level II format.
- The FACSys Gateway faxes the PostScript objects to the remote fax destination.

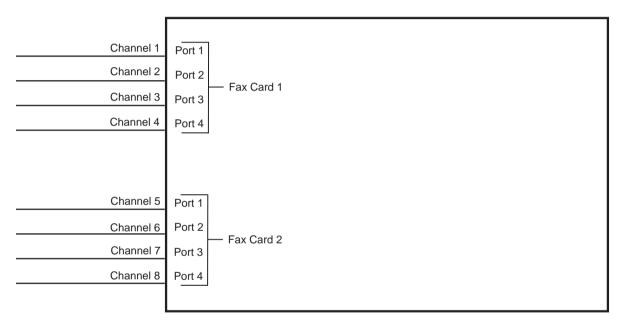
#### The following illustrates the Panagon Fax Outbound Fax Process.



#### 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.



Network Fax Server

#### **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)	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:
	http://www.css.filenet.com/documentation/ index.html
	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.
Line (Channel) Routing	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.
Manual Routing by the Network Fax Server Administrator	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.
Non-IDMIS Routing	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.

#### **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.

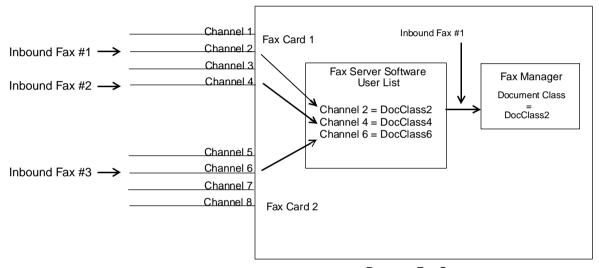
To configure DID, refer to the Panagon Fax Installation Guide.

#### **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 the Panagon Fax Installation Guide.

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.



Panagon Fax Server

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

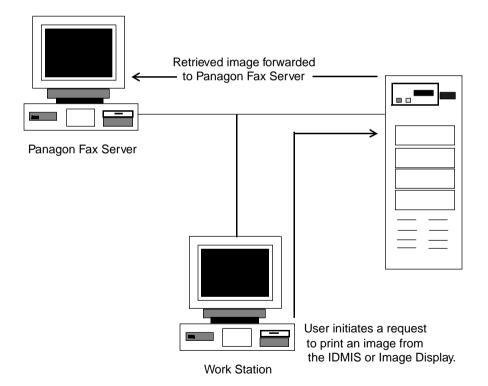
Do not install the Panagon Fax Server software components on a Windows NT machine on which you have installed IDMIS server software.

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 the Fax Manager.

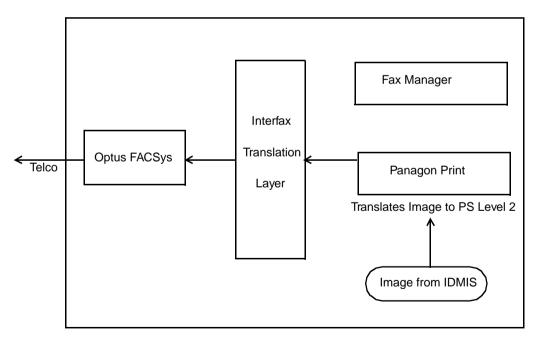
When you want to send an image to a remote destination through fax, use either the WorkForce Desktop Image Display (FileNET print option) or the Panagon IDM Desktop (FileNET print option) to submit the fax request to the IDMIS. The IDMIS server forwards the image(s) to the Panagon Fax server.



### **Panagon Print**

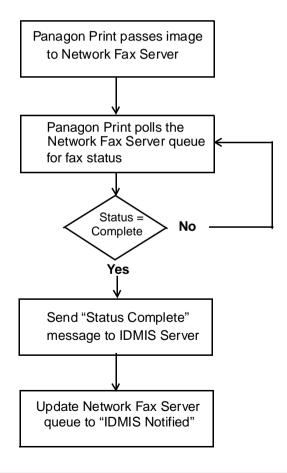
The Panagon Print software on the Panagon Fax server performs the following functions in the outbound fax process:

- 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



Panagon Fax

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), 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".

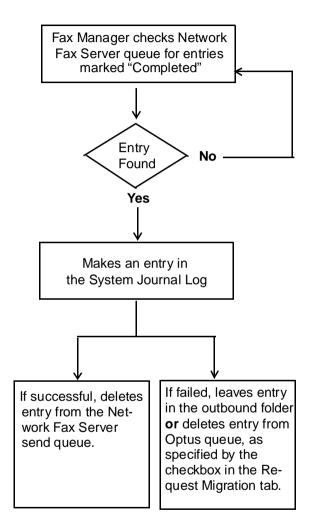


The Panagon Fax Manager works with Panagon Print to manage the Network Fax Server send queue for outbound faxes. It checks the Network Fax Server send queue for entries with a status of "Completed".

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.

If the Fax Manager finds a "Completed" item with a "failed" status in the send queue, the Fax Manager leaves this item in the send queue. The fax can then be retried, or manually printed or faxed.

For information on failed faxes, see "Retrying Failed Faxes" on page 69.



#### 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 "Routing Options" on page 35.

### **Journal Logs and Activity Trace**

The Fax Manager and Fax Entry 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 Fax Entry and the Fax Manager can have their respective journal log files migrated 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 Fax Entry. Activity trace files can be migrated to the IDMIS through the Fax Entry or backed up to disk for later review and analysis.

# **Managing Outbound Documents**

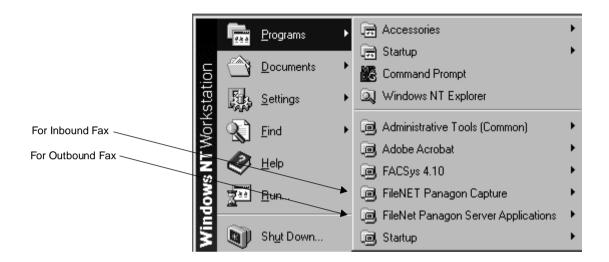
This chapter describes how to initiate the Panagon Fax software and the applications contained in the FileNET Panagon Server Applications program group. These applications are used to manage outbound documents. Refer to the WorkForce Desktop User's Guide for supplementary information.

# **Starting Panagon Fax Software**

Panagon Fax Manager works with other Panagon Fax software components to send FileNET images through a local or remote Network Fax Server. When configured correctly for your environment, Panagon Fax Manager performs its functions automatically without user intervention.

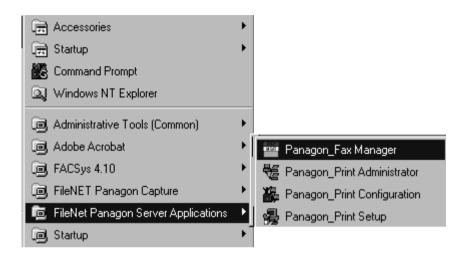
Panagon Fax uses icons in two program groups. The FileNET Panagon Fax Entry icon, located in the FileNET Panagon Capture program group, initiates inbound fax. The Panagon Fax Manager icon, located in the FileNET Panagon Server Applications program group, initiates outbound fax. Both program group icons are located in the Windows NT Program Manager.

When you install Panagon Fax software, you can choose to have the FileNET Panagon Fax Entry icon, the Panagon Fax Manager icon and Panagon Print Administrator icon automatically copied to the Startup group on your Windows desktop. This allows remote stations to transmit and/or receive faxes when the Windows NT server boots.



Double click on the FileNET Panagon Server Applications program group.

The FileNET Panagon Server Applications program group contains the applications that you will use to manage outbound fax documents.



The following table describes the function of these icons and lists a page number where you can find more information.

Icon	Description	See
Panagon Fax Manager	Provides banners, a journal, and an activity trace for monitoring outbound, successful, and failed fax transmissions.	<u>page</u> <u>51</u>
Panagon Print Administrator	Monitors fax activity between the server and printer and between the IDMIS and print server. It also displays the fax error log and statistics.	<u>page</u> <u>71</u>

	Displays and changes Panagon Print configuration parameters.	<u>page</u> <u>87</u>
Panagon Print Configuration		
	Upgrades to newer versions of the Panagon Fax Print edition.	page 89
Panagon Print Setup		

# **Panagon Fax Manager**

Use the Panagon Fax Manager application to:

- Monitor outbound fax activity.
- View outbound, successful, and failed fax transmissions. Failed fax transmissions include failed faxes that will be retried and those that will be deleted and not retried.
- View condensed, normal, or detailed journal information.
- View and change Panagon Fax Manager configuration parameters.
- Trace Panagon Fax Manager activities.

## **Accessing the Panagon Fax Manager Window**

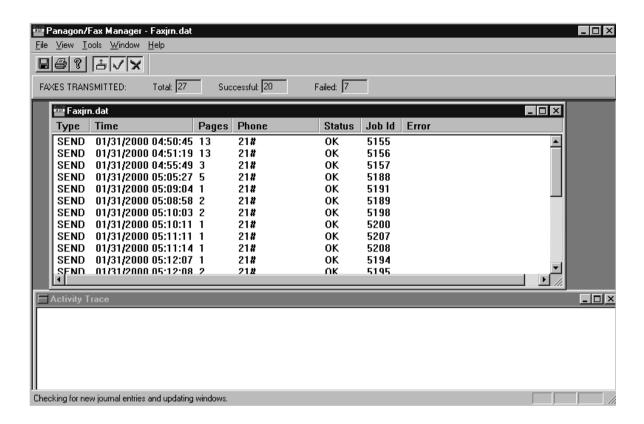
The Panagon Fax Manager icon is located in the FileNET Panagon Server Applications program group.

To access the Panagon Fax Manager, double-click on the following icon:



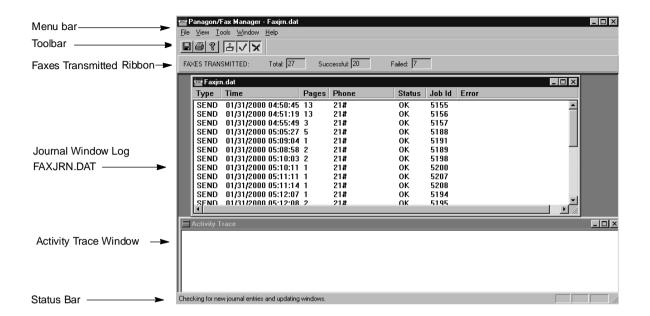
Panagon Fax Manager

The following window displays.



### **Understanding the Panagon Fax Manager Window**

The following window shows the Panagon Fax Manager window components. In this case, the right half of the FAXJRN.DAT journal window is displayed in Detailed view.



#### Note

When the Panagon Fax Manager window displays, the FAXJRN.DAT journal window also displays, but the Activity Trace window does not. To display the Activity Trace window, select Activity Trace in the Tools menu.

#### Menu Bar

The menu bar contains commands to perform various Panagon Fax Manager tasks. Some menus and commands are always available, while others are available only when the FAXJRN.DAT journal window or Activity Trace window is active.

The following table describes each pull-down menu in the Menu Bar (as illustrated in the File pull-down).

See "Switching Between Windows" on page 67 for information on how to make a window active.

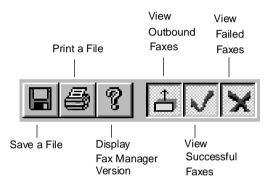


Menu	Command	Description
File	Save As	Saves an open file in a new directory or under a new name.
	Print	Prints a file.
	Print Preview	Shows how the printed journal will appear before you print it.
	Print Setup	Selects print parameters.
	Exit	Exits the Panagon Fax Manager window.

<b>View</b> Toolbar		Displays or hides the toolbar.	
	Status Bar	Displays or hides the status bar.	
	Outbound	Displays outbound faxes in the journal window.	
	Successful	Displays successfully sent faxes in the journal window.	
	Failed	Displays unsuccessfully sent faxes in the journal window.	
	Condensed	Displays minimal information about each fax transaction.	
	Normal	Provides basic information about each fax transaction.	
	Detailed	Provides maximum information about each fax transaction.	
Tools	Activity Trace	Displays or hides the Activity Trace window.	
	Configuration	Displays and changes Panagon Fax Manager configuration parameters.	
Window		Arranges the windows on your desktop.	
Help		Displays online help.	

#### **Toolbar**

The Toolbar appears below the menu bar. The toolbar provides a fast way to perform tasks. The following illustration describes the tools in the toolbar.



All these tools are available when the FAXJRN.DAT journal window is active. The four tools on the right affect which entries will display in the journal window.

Tip To see the function of a tool, place your mouse pointer over the tool. Tool tips automatically appear at the pointer location, explaining the function of the tool.

You can toggle the tool bar on or off by using the Tool Bar command in the View menu.

### **Faxes Transmitted Ribbon**

The Faxes Transmitted ribbon is below the toolbar and shows:

- The total number of outbound fax requests the Network Fax Server queue processed.
- The number of outbound requests completed successfully.
- The number of outbound requests that failed.

The number of successful and failed outbound requests equals the total number of outbound fax requests passed to the Network Fax Server queue. The following illustration shows a typical outbound migration ribbon.

FAXES TRANSMITTED:	Total: 317	Successful: 306	Failed: 11
--------------------	------------	-----------------	------------

#### **FAXJRN.DAT Journal**

#### Note

If the Migrate Failed Outbound Fax checkbox is not checked in the Request Migration tab of the Panagon Fax Manager Configuration, failed faxes will **not** be logged in the Journal.

The Panagon Fax Manager window automatically displays the FAXJRN.DAT journal. The FAXJRN.DAT journal contains columns that show the fax activity status by reflecting the contents of the FAXJRN.DAT file. The FAXJRN.DAT file resides in the c:\fnsw\_loc\tmp directory.

You can automatically save journal entries from the Journal Log file FAXJRN.DAT to a customizable journal file on the Panagon Fax server's disk by enabling Journal AutoSave in the Panagon Fax Manager configuration. This journal file can be committed to the IDMIS and moved to Local or BES cache without being backed up, or backed up to a local or network drive, or both.

The name of the journal file is system-assigned. The file name format is:

JRNmmddA.yyy

#### where

mmdd represents the month and date that the journal file was created

A is a fixed character with no significance

yyy is the sequence number

Each line in the journal window is a fax transaction, with recent transactions appearing at the bottom of the window. The maximum number of entries that can be displayed in the journal window defaults to 500. The contents in the FAXJRN.DAT journal are updated according to the AutoSave Interval value you entered during Panagon Fax configuration (refer to the Panagon Fax Manager online help).

Additionally you can save current data from the journal window by selecting the Save button from the toolbar or the SaveAs in the File Menu. The data will be saved with the file extension .TXT to indicate that it is an ASCII file. You can use a different extension by deleting the .TXT extension and replacing it with any three-character extension. The file is saved in the fnsw\_loc\tmp directory by default.

### **Viewing Information in the Journal Window**

You can use the toolbar or the commands in the View menu to control the amount of information shown in the journal window, such as:

Toolbar	Provides tools for viewing all fax transac-
---------	---

tions, or toggles outbound, successful, or

failed transactions on and off.

View menu commands Provides commands for performing toolbar

functions and for viewing condensed, normal, and detailed information in the journal window. The following table describes the

fields that display for each view.

**Tip** To change the journal window view quickly, place the pointer in the journal window, click the right mouse button to display a popup menu, and select a command.

View	Fields	Description
Condensed	Туре	Shows whether a fax has been transmitted (SEND).
	Time	The date and time, in 24-hour format, when a fax was sent.
	Pages	The number of pages sent.
	Phone	The telephone number of the remote fax destination.
	Status	Shows if a transaction was successful (OK), cancelled (ABORT), or resulted in an error (ERR).
	Job ID	The outbound fax Job ID number is assigned by Print Services.
	Error	Shows the cause of an error, if a transmission cannot be completed. See "Viewing Errors in the Journal Window" on page 64.

**Normal** Shows the Condensed information and adds:

Recipient Specifies the name of the sender for an out-

bound fax.

Channel The Panagon Fax Server port through which

the fax was sent.

**Detailed** Shows Condensed view and Normal view, and adds:

Duration The duration of the fax transaction in sec-

onds.

Caller The telephone number, if any, programmed

into the remote facsimile device.

Dcl Time The outbound fax Job ID number assigned

by Print Services.

Doc ID The IDMIS document ID that is assigned

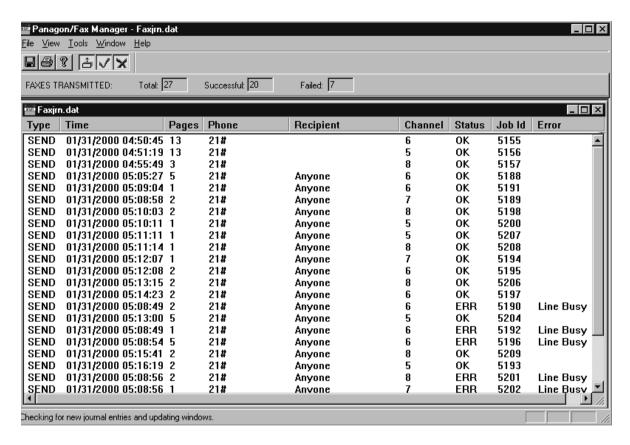
when the document is committed to optical disk. For additional explanation, see "Images

and Documents" on page 23.

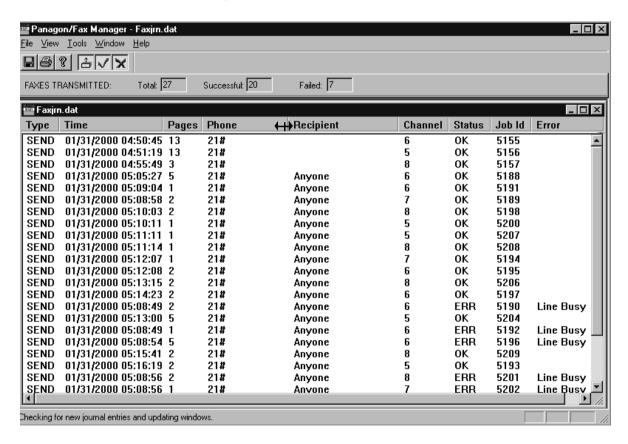
User ID The name that the user entered to log on to

the IDMIS server.

The following illustration shows a typical FAXJRN.DAT journal window that displays a normal view of outbound transactions.



If you need to adjust the width of a field to view the information in it, move the pointer to the edge of the field you want to widen or narrow (the pointer changes to +>). In the following example, the pointer is between the Phone and Recipient. Drag the field to the left to narrow it or to the right to widen it.



### Viewing Errors in the Journal Window

The following lists the errors that can appear in the Error column and describes their meanings.

<u>Error</u>	Meaning
Line Error	A line error, such as excessive noise, disrupted the fax transaction.
Local Error	An error occurred with the Panagon Fax system.
Remote Error	An error occurred at the remote facsimile destination.
Incompatible	The remote facsimile device is not compatible with the Panagon Fax devices.
No Fax	There is no facsimile device at the fax number dialed.
Disconnected	The fax call disconnected unexpectedly.
No Dial Tone	A call was not placed because a dial tone could not be detected.
Line Busy	The fax number dialed was busy.
Line Dead	The telephone line is not operational.
No Answer	The remote facsimile device did not answer the call.
Unknown	An unknown error occurred.
Migration Error	An error caused by corrupt data or missing pages during migration of the fax from the Network Fax Server to the Fax Manager.

### **Closing the Journal Window**

To close the journal window, double-click on the "x" in the top-right corner of the journal window. The journal window becomes an icon within the Panagon Fax Manager window. To restore the journal window, double-click on the icon.

### **Activity Trace Window**

Use the Activity Trace command in the Tools menu to trace the progress of fax transactions. This window is particularly useful for troubleshooting. Trace data is saved to a file named FaxTRACE.DAT that resides in the \fnsw\_loc\tmp directory.

The following illustration shows an Activity Trace window:



There are two ways to close the Activity Trace window:

- Double-click on the "x" in the top-right corner of the Activity Trace window.
- Select Tools and uncheck the Activity Trace option.

To redisplay the Activity Trace window, select Tools and check the Activity Trace option.

#### Note

Displaying the Activity Trace window affects some menus and commands. See <u>"Menu Bar" on page 54</u> for more information.

### **Switching Between Windows**

Although the Panagon Fax Manager can display the FAXJRN.DAT journal window and Activity Trace window at the same time, only one of these windows can be active.

When a window is not active, its information is updated as an activity occurs. For example, the journal window will still record the current fax activity even if the Activity Trace window is the active window.

To make a window active, click on it or select the window in the Window menu. Either method highlights the title bar to indicate that the window is active.

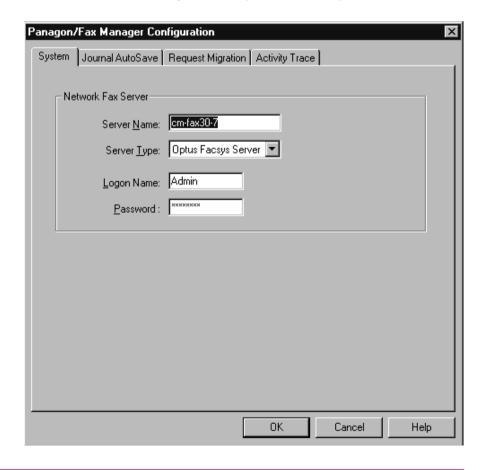
#### Status Bar

The status bar at the bottom of the Panagon Fax Manager window shows actions currently being performed. You can toggle the status bar on or off by using the Status Bar command in the View menu.

# **Configuring Panagon Fax Manager**

Using the Configuration command in the Tools menu, you can view and change Panagon Fax Manager configuration parameters.

When you select Configuration, a dialog box similar to the following displays. This is the same dialog box that was completed during the Panagon Fax installation. For information on the dialog box parameters, refer to the online help for *Panagon Fax Manager*.



#### **Retrying Failed Faxes**

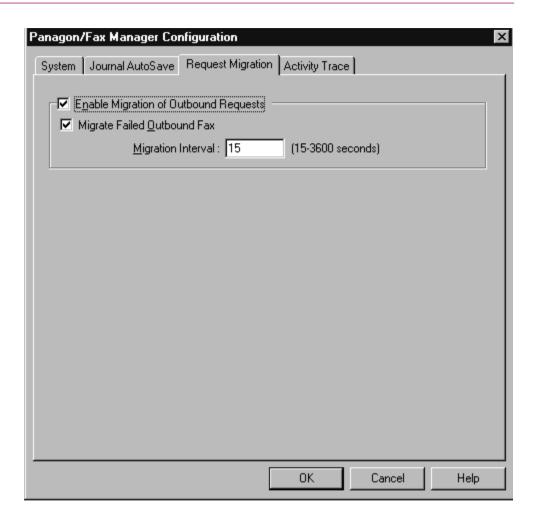
If the Migrate Failed Outbound Fax checkbox **is not** checked in the Request Migration tab of the Panagon Fax Manager Configuration, failed faxes:

- Fax Manager will not migrate any failed faxes.
- Will be logged in the Journal.
- Will display in the Faxes Transmitted ribbon.
- Will display in the Activity Trace window.
- Will remain in the Optus outbound folder to be manually sent again at a later time. Refer to Optus documentation for instructions to manually retry failed faxes.

As in previous releases, if the Migrate Failed Outbound Fax checkbox **is** checked in the Request Migration tab of the Panagon Fax Manager Configuration, failed faxes:

- Fax Manager migrates all failed faxes (as well as successful ones)
- Will be logged in the Journal.
- Will display in the Faxes Transmitted ribbon.
- Will display in the Activity Trace window.
- Will be deleted from the Optus queue.

The Request Migration tab is illustrated on the following page.



# **Panagon Print Administrator**

Using the Panagon Print Administrator application, you can:

- Monitor activity between the server and printer.
- Monitor activity between the IDMIS and print server.

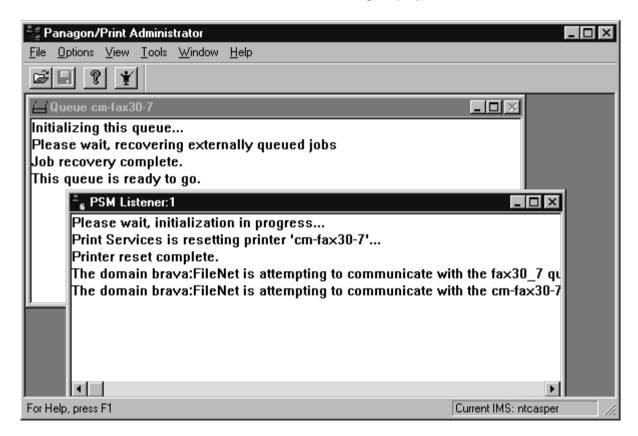
# **Accessing the Panagon Print Administrator Window**

The Panagon Print Administrator icon is located in the FileNET Panagon Server Applications program group.

To access the Panagon Print Administrator, double-click on the following icon:

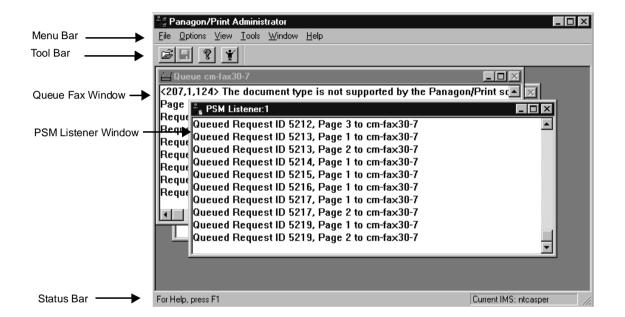


A window similar to the following displays:



## **Understanding the Panagon Print Administrator Window**

The following illustration shows the Panagon Print Administrator window components.



### Menu Bar

The menu bar contains commands for performing various Panagon Print Administrator tasks. Some menus and commands are always available, while others are available only when the Queue window is active.

The following table describes the available menus and commands. For example, the Configuration command in the Tools menu is available when either the Queue window or PSM Listener window is active. The Download PostScript command in the Tools menu, however, is only available when the Queue window is active; it is not available when the PSM Listener window is active.

### Note

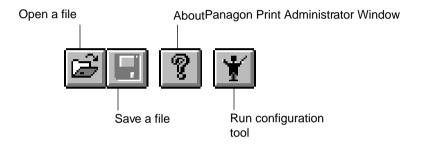
To make a window active, click on it or select the window's name from the Window menu.

<u>Menu</u>	Command	Description
File	Open	Opens a file.
	Close	Closes a file.
	Save	Saves a file.
	Save As	Saves a file in a new directory or under a new name.
	Clear	Clears the currently active window.
	Exit	Exits the Panagon Print Administrator window.

Options	Verbose Mode	Provides complete information relevant to the currently active window.
	Time Stamp	Shows the date and time of each occurrence in a window.
	Logging	Saves all information in the currently active window to a disk file.
	Retain Files	Saves printer-ready files for trouble- shooting. (Only available when Queue window is active.)
View	Toolbar	Displays or hides the toolbar.
	Status Bar	Displays or hides the status bar.
	Error Log	Displays a log of fax errors.
	Statistics	Displays fax statistics.
Tools	Configuration	Displays and changes the Panagon Print Administrator configuration parameters.
	Download PS files	Downloads PostScript files to the printer/fax queue. (Only available when Queue window is active.)
Window		Arrange the windows on your desktop.
Help		Displays Panagon Print Administrator online help.

## **Toolbar**

The Toolbar appears below the menu bar. The toolbar provides a fast way of performing tasks. The following illustration describes the tools in the toolbar.

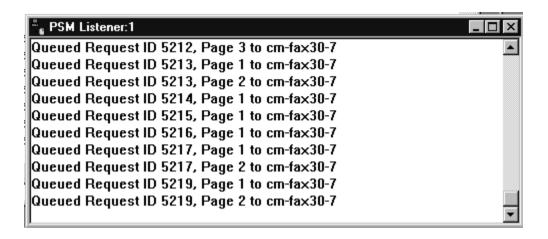


You can toggle the tool bar on or off by using the Tool Bar command in the View menu.

### **PSM Listener Window**

The Print Services Manager (PSM) Listener window automatically displays in the Panagon Print Administrator window. This window displays the activity between the IDMIS and the print server.

The following illustration shows an example of a PSM Listener window.



With this window displayed, you can use the following commands in the Options menu to perform the corresponding tasks:

Verbose Mode Describes each action between the IDMIS and the print server, as shown in the previous illustration.

Time Stamp Displays the date and time of each line in the PSM

Listener window.

Logging Saves the PSM Listener information to a file on the

hard drive.

To close this window, double-click on the "x" in the top-right corner. If another fax (print) job is being processed but no other PSM Listener windows are open, the print job displays in a new PSM Listener window; otherwise, no PSM Listener windows display in the Panagon Fax Administrator window. To redisplay the PSM Listener window, exit the Panagon Print Administrator window and then redisplay it.

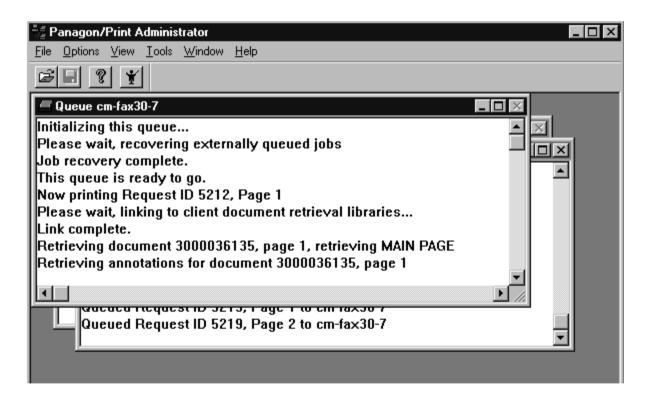
## Note

Making the PSM Listener window active affects some menus and commands (See "Menu Bar" on page 73 for more information). To make another open window in the Panagon Print Administrator window active, click on the other window or select its name from the Window menu.

## Queue Fax Window

The Queue Fax window automatically displays in the Panagon Print Administrator window. This window displays the activity between the third-party fax server and the printer.

The following illustration shows an example of a Queue Fax window.



With this window displayed, you can use the following commands in the Options menu to perform the following tasks:

Verbose Mode Describes each action between the fax server and the

printer, as shown in the previous illustration.

**Time Stamp** Displays the date and time of each line in the Queue

Fax window.

**Logging** Saves the Queue Fax information to a file on the hard

drive.

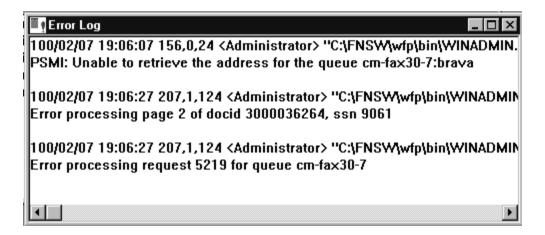
**Retain Files** Saves printer-ready files for troubleshooting.

#### Note

Making the Queue Fax window active affects some menus and commands (See "Menu Bar" on page 73). To make another open window in the Panagon Print Administrator window active, click on the other window or select its name from the Window menu. You cannot close the Queue Fax window.

If you encounter errors when sending faxes, use the Error Log command in the View menu to display the Error Log window. This Log can help you identify errors in your fax transmissions.

The following is an example of an Error Log window. To close, doubleclick on the "x" in the top-right corner. To close, double-click on the "x" in the top-right corner.



### Note

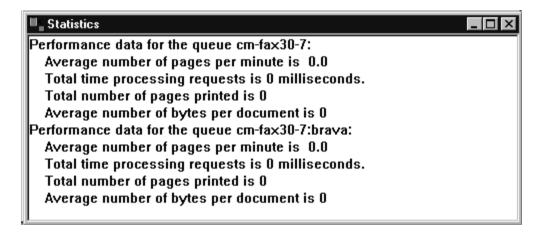
Displaying the Error Log window affects some menus and commands. To make another open window in the Panagon Print Administrator window active, click on the other window or select its name from the Window menu.

### Statistics Window

The Statistics window provides statistics on fax activity that may be helpful to you.

To display the Statistics window, make the Queue window active, then select Statistics from the View menu.

This illustration shows an example of a Statistics window.



To close the Statistics window, double-click on the "x" in the top-right corner.

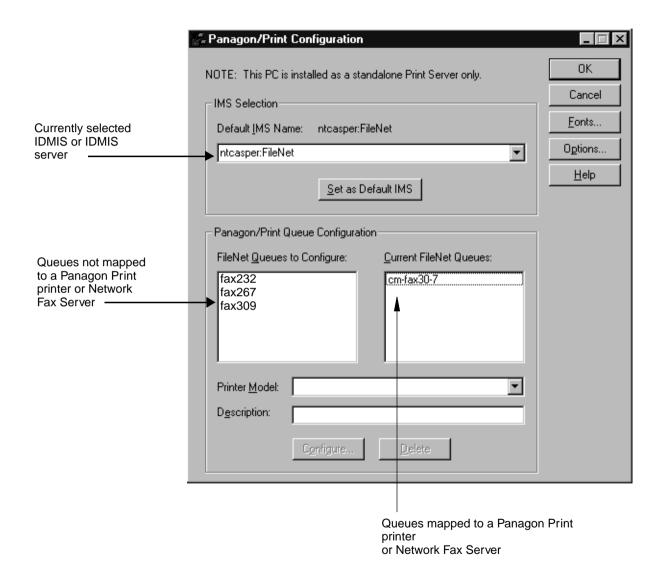
#### Note

To make another open window in the Panagon Print Administrator window active, click on the other window or select its name from the Window menu.

# **Configuring Queues with the Panagon Print Administrator**

Using the Configuration command in the Tools menu, you can view configuration parameters that apply to a specific gueue and general parameters that apply to all queues. You can also change these parameters if your Windows NT user name has edit access to the Panagon Print configuration.

When you select the Configuration command in the Tools menu of the Panagon Print Administrator menu, a dialog box similar to the following displays.



## Note

This is the same dialog box completed during the Panagon Fax installation. You can also access this dialog from the Panagon Print Configuration icon in the FileNET Panagon Fax Server Applications window. For more information on selecting configuration parameters, refer to the *Panagon Fax Installation Guide* and the online help for *Panagon Print Configuration*.

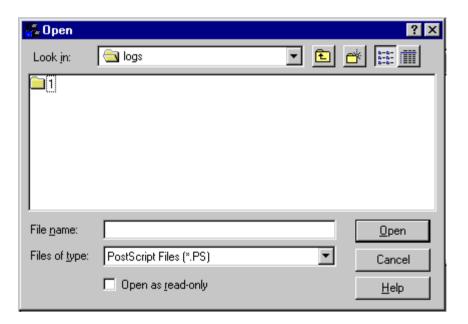
## From this dialog box, you can:

- Configure print queues.
- Use the Fonts button to configure fonts and character sets for all queues configured on the print server.
- Use the Fonts and Map Fonts buttons to map a Pcode font to a PostScript font.
- Use the Options button to specify:
  - Primary cache and temporary files directories.
  - The maximum number of pages for each FileNET queue.
  - The date and time format that displays on a Request Header page.
  - Verbose mode, checksum, annotation, and margin note and highlight parameters.
  - A fax user key delimiter.

## **Downloading PostScript Information**

Use the Download PostScript command in the Tools menu to download a PostScript file from the personal computer's hard disk to the printer or fax queue for transmission to a remote facsimile destination.

When you select Download PostScript, a dialog box similar to the following displays.



You can then select the PostScript file you want to download and click OK. If the PostScript file is not at the location shown, you can use the controls in the dialog box to change to the drive and directory where the file resides, then select the file and click OK.

### **Note**

The Download PostScript command is only available when the Queue window is active. See "Menu Bar" on page 73 for more information.

# **Panagon Print Configuration**

Use the Panagon Print Configuration application to view and change Panagon Print configuration parameters.

The Panagon Print Configuration icon is located in the FileNET Panagon Server Applications window. To access the Panagon Print Configuration dialog box, double-click on the following icon:





A dialog box similar to the following displays.

### **Note**

This is the same dialog box that was completed during the Panagon Fax installation. You can also access this dialog box from the Panagon Print Administrator Tools menu (see page 41). For information on the dialog box parameters, refer to the Panagon Fax Installation Guide or the online help for Panagon Print Configuration.

# **Panagon Print Setup**

Use the Panagon Print Setup application to upgrade to a newer release of Panagon Print software.

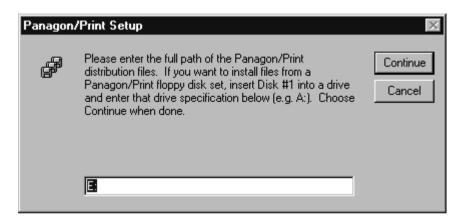
# **Accessing the Panagon Print Setup Window**

The Panagon Print Setup icon is located inside the FileNET Panagon Server Applications program group.

To access the Panagon Print Setup dialog box, double-click on the following icon:



A dialog box similar to the following displays.



When this dialog box appears:

- 1 Insert the diskette or CD containing the new version of Panagon Print in a drive.
- 2 Change the drive letter in the dialog box (if necessary) to reflect the drive where you inserted the disk or CD.
- Click on Continue. 3
- 4 Follow the screen prompts to install the new version of Panagon Print.

# **Managing Inbound Documents**

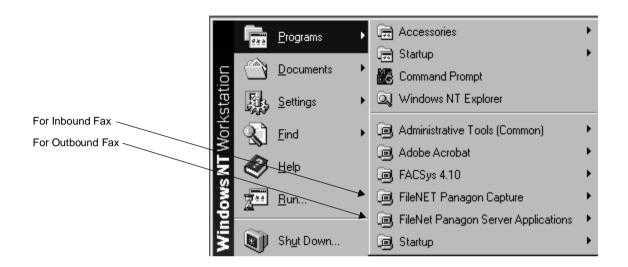
This chapter describes how to initiate the Panagon Fax software and the applications contained in the Fax Entry program group. These applications are used to manage inbound fax documents.

# **Starting Panagon Fax Software**

When you install Panagon Fax software, you can have the FileNET Panagon Fax Entry icon located in the FileNET Panagon Capture program group, moved to the Startup program group.

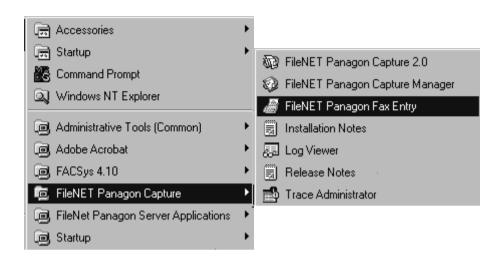
You can also move the Panagon Fax Manager program icon from the FileNET Panagon Server Applications program group to the Startup program group. Startup is located in the Programs group in the Start taskbar. Doing so starts Panagon Fax Entry and the Panagon Fax Manager automatically each time you start Windows NT.

For more information, refer to your Windows NT documentation.



To open the FileNET Panagon Capture group, double-click the Panagon Capture icon.

The FileNET Panagon Capture group contains the FileNET Panagon Fax Entry programs. The icons in the FileNET Panagon Capture group are shown as follows. These icons contain the applications that you will use to manage inbound fax documents.



The following sections describe these applications.

# **Panagon Fax Entry**

Panagon Fax Entry is used to process inbound documents for delivery to the IDMIS and to the Local or BES cache and/or back them up to a local or network drive.

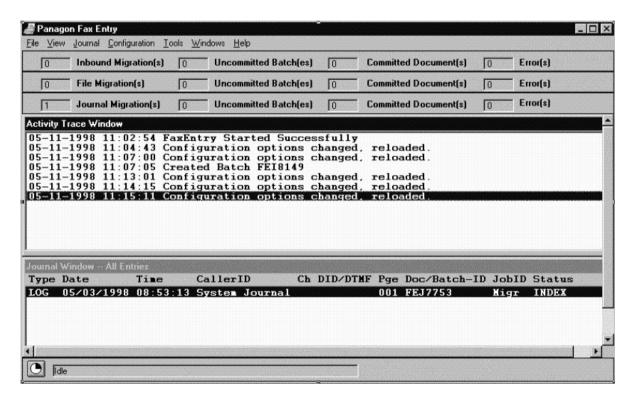
Use Panagon Fax Entry to:

- View inbound document status
- View and change the FaxEntry configuration parameters (if permitted)
- Trace inbound fax activities

# **Accessing the Panagon Fax Entry Window**

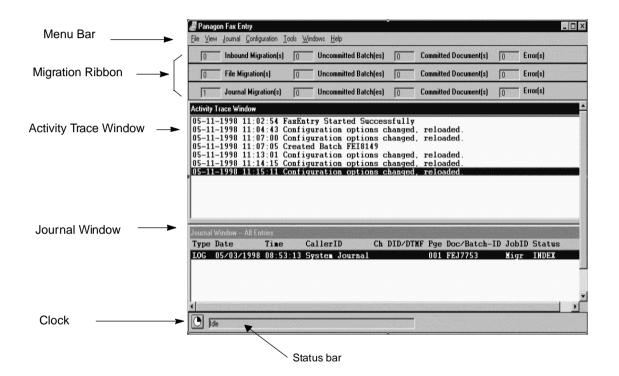
To access the Panagon Fax Entry window, double-click on the FileNET Panagon Fax Entry icon located in the FileNET Panagon Capture program group:

The following window indicates that Fax Entry started successfully.



# **Understanding the Panagon Fax Entry Window**

The following illustration shows Panagon Fax Entry window components.



### Note

In this screen, all Migration ribbons are displayed. You can toggle each ribbon on or off using the View menu. The ribbons display when enabled in the Configuration menu and do not display when disabled.

## Menu Bar

The menu bar contains commands for performing various Panagon Fax Entry tasks.

The following describes the available menus and commands.

<u>Menu</u>	<u>Command</u>	<u>Description</u>
File	Migrate Journal Now	Manually migrates the journal to optical disk. Overrides the Migration Interval parameter configured in the Journal Migration Configuration dialog box.
	Convert Journal	Converts the journal log to a binary file to an ASCII text file.
	Exit	Exits the Panagon Fax Entry window.
View	Journal Migration	Displays or hides the journal migration ribbon if Journal Migration is enabled in the Configuration pulldown menu.
	Inbound Migration	Displays or hides the inbound migration ribbon if Inbound Migration is enabled in the Configuration pulldown menu.
	File Migration	Displays or hides the file migration ribbon if File Migration is enabled in the Configuration pull-down menu.

Journal Show All Entries Displays all migrated inbound, file,

and other fax entries in the Journal

Window

Clear All Entries Clears all fax entries from the Jour-

nal Window.

Migrated Inbound Entries Displays only inbound faxes that

have been processed in the Jour-

nal Window.

Migrated File Entries Displays all files in the Journal Win-

dow that have been processed.

Migrated Journal Entries Displays all Journal Logs that have

been processed.

Refresh Screen Enables the user to manually re-

> fresh the screen; the journal screen continues to be updated automati-

cally.

<u>Menu</u>	Command	<u>Description</u>
Configuration	Journal Migration	Displays and changes journal migration configuration parameters.
	Inbound Migration	Displays and changes inbound migration configuration parameters.
	File Migration	Displays and changes file migration configuration parameters.
	System	Displays and changes system configuration parameters.
	Trace	Displays and changes activity trace configuration parameters.
Tools	Activity Trace	Displays or hides the Activity Trace Window.
Window		Arranges the windows on your desktop and displays which windows are active.
Help		Displays online help.

## **Journal Migration**

Journal Migration is configured in the Journal Migration Configuration dialog box, where parameters are set during the installation of Panagon Fax Entry. Most parameters can be changed later. Refer to the Panagon Fax Installation Guide and the Panagon Fax Online Help for details

You can set the number of journal records that can accumulate in the Journal Log file in the Max Journal Record Count parameter. Journal log entries are circular in nature. According to the maximum number of entries set, the last entry will be deleted when capacity is reached and the next entry is input.

Additionally, if the Enable Journal Migration option is enabled, the Journal Log will be committed to the IDMIS and moved to Local or BES cache, or backed up to the Backup Directory field specification when the Max Journal Record Count parameter reaches this value, even if the Migration Interval parameter has not expired. At that time, the screen is cleared and ribbon counters are reset to zero. The default is 500 entries, but may be set from 100 to 5000 entries.

Specify the number of lines per page on each journal file in the Lines Per Page parameter. The default is 40 lines, but may be set from 10 through 200 lines.

You can specify the length of time that must elapse after the journal file has been processed, before Fax Entry looks for the next journal file. The default value is 60 seconds, but can be set within the range of 10 - 3600 seconds in the Migration Interval parameter.

The journal file to be processed is contained in the default folder named \FaxEntry\Journal\FEJrn.log. You can assign a new folder in the Journal File Name parameter.

You can move your files to Local or BES cache and commit them for storage on the IDMIS without backing them up, or back them up to a local or network drive, or do both. Specify this setting in the Migration Option parameter. If you are backing your files up, or backing up and committing to the IDMIS, the default backup folder is \FaxEntry\Backup. This parameter is specified in the Backup Directory parameter.

## **Journal Migration Ribbon**

The Panagon Fax Entry window provides a Journal Migration Ribbon that summarizes journal entry information. Migration takes place when one of the following occurs:

- When a preset time interval lapses
- When a preset number of fax requests accumulate

Information in the Journal Migration Ribbon Information includes:

**Journal Migration** The total number of journals processed

**Uncommitted Batch(es)** The number of journals that are not com-

mitted and reside in the BES Repository.

Committed Document(s) The number of journals committed to opti-

cal disk as documents

To display the journal migration ribbon, select Journal Migration from the View menu. The Journal Migration menu option will be grayed (not available) unless Journal Migration is enabled in the Configuration menu and in the View menu.

The following illustration shows a typical Journal Migration Ribbon.



## **Inbound Migration**

Inbound Migration is configured in the Inbound Migration Configuration dialog box, where parameters are set during the installation of Panagon Fax Entry. Most parameters can be changed later. Refer to the Panagon Fax Installation Guide and the Panagon Fax Online Help for details

Panagon Fax Entry migrates files in groups. You can specify the length of time that must elapse after a group of files have been processed, before Fax Entry looks for additional files. The default value is 60 seconds, but can be set within the range of 10 - 3600 seconds in the Migration Interval parameter.

During each migration period, Panagon Fax Entry, by default, processes 10 files in a group. You may want to limit the number of files to avoid network congestion. You can change the default to a range from 1 - 20 in the Requests per Migration parameter.

You can commit your files for storage on the IDMIS and move them to Local or BES cache without backing them up, or back them up to a local or network drive, or do both. Specify this setting in the Migration Option parameter. If you are backing your files up, or backing up and committing to the IDMIS, the default backup folder is \FaxEntry\Backup. This parameter is specified in the Backup Directory parameter.

Failed inbound data, such as data that did not complete transmission, are stored in the default error folder \FaxEntry\Error. You can change the error folder by specifying a new folder in the Error Directory parameter.

## **Inbound Migration Ribbon**

The Panagon Fax Entry window provides an Inbound Migration Ribbon that shows summary information of inbound entries. Information includes:

- The total number of inbound faxes processed.
- The number of inbound fax requests processed as uncommitted batches (multiple documents) and left in local or BES repositories.
- The number of inbound fax requests migrated to the IDMIS optical disk.

The number of uncommitted batches and committed documents equal the total number of inbound faxes received.

To display the inbound migration ribbon, select Inbound Migration from the View menu.

### Note

The Inbound Migration menu option will be grayed (not available) unless Inbound Migration is enabled in the Configuration menu and the View menu.

The following illustration shows a typical Inbound Migration Ribbon.



### Note

The FileNET Scanning status box will display briefly as Panagon Fax processes inbound faxes.

## **File Migration**

File Migration is configured in the File Migration Configuration dialog box, where parameters are set during the installation of Panagon Fax Entry. Most parameters can be changed later. Refer to the *Panagon* Fax Installation Guide and the Panagon Fax Online Help for details.

Panagon Fax Entry migrates files in groups. You can specify the length of time that must elapse after a group of files have been processed. before Fax Entry looks for additional files. The default value is 60 seconds, but can be set within the range of 10 - 3600 seconds in the File Migration Interval parameter.

During each migration period, Panagon Fax Entry, by default, processes 10 files in a group. You may want to limit the number of files to avoid network congestion. You can change the default to a range from 1 - 20 in the Files per Migration parameter.

Files to be processed are contained in the default folder \FaxEntry\File. Any file in this folder will be processed and deleted after processing. You can assign a new folder in the File Migration Path parameter.

You can commit your files for storage on the IDMIS and move them to Local or BES cache without backing them up, or back them up to a local or network drive, or do both. Specify this setting in the Migration Option parameter. If you are backing your files up, or backing up and committing to the IDMIS, the default backup folder is \FaxEntry\Backup. This parameter is specified in the Backup Directory parameter.

## **File Migration Ribbon**

The Panagon Fax Entry window provides a File Migration Ribbon that shows summary information of file entries. Information includes:

- The total number of files processed.
- The number of file requests migrated as Uncommitted Batches (multiple documents).
- The number of files committed to the IDMIS optical disk.

The number of uncommitted batches and committed documents equal the total number of file faxes received.

To display the file migration ribbon, select File Migration from the View menu.

### Note

The File Migration menu option will be grayed (not available) unless File Migration is enabled in the Configuration menu and in the View menu.

The following illustration shows a typical File Migration Ribbon.



### Journal Window

By default, the Journal Window automatically displays in the Panagon Fax Entry window. The Journal Window monitors all migrated inbound, file, and other fax entries.

Journal log entries are circular in nature. According to the maximum number of entries set, the last entry will be deleted when capacity is reached and the next entry is input. You can specify the maximum number of entries by setting the Max Journal Record Count parameter in the Journal Migration Configuration dialog box. The entries are sequentially and chronologically ordered.

The default is 500 entries. To change the default, enter a new limit. The range is 100 to 5000 entries.

## **Changing Journal Window View**

Enabling one or more options under the View pull-down menu will display all or selected entries in the Journal Window:

Show All Entries Shows all inbound faxes, files, and jour-

nal entries.

Clear All Entries Clears the journal window of all entries.

> A dialog box also asks if you want to clear the journal log. If you answer yes, the journal log will be cleared and the in-

formation it contains will be lost.

**Migrated Inbound Entries** Shows all inbound faxes that Panagon

> Fax Entry has attempted to commit to the IDMIS or back up. Define the method of processing faxes on the Inbound Mi-

gration Configuration screen.

**Migrated File Entries** Shows all files that Panagon Fax Entry

> has attempted to commit to the IDMIS or back up. Define the method of processing files on the File Migration Configura-

tion dialog box.

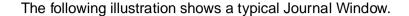
**Migrated Journal Entries** Shows all journal log entries that Pa-

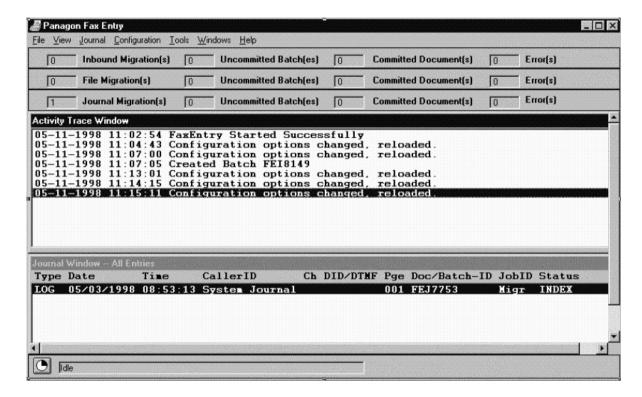
> nagon Fax Entry has attempted to commit to the IDMIS or back up. Define the method of processing journal files on the Journal Migration Configuration screen.

Refresh Journal Entries Refreshes the screen; the journal screen

continues to be updated automatically.

For additional information, refer to the *Panagon Fax Online Help*.





aiT The contents in the Journal Window are updated according to the AutoSave Interval value you entered during the Panagon Fax configuration. The number of entries displayed in the Journal Window is defined in the Max Journal Record Count field of the Journal Migration Configuration dialog box. Using this field, you can display from 100 to 5,000 entries in the Journal Window.

Initially, the number of entries shown in the Journal Window is based on the value you entered in the Max Journal Record Count field when you configured Panagon Fax. To change this value, select Journal Migration from the Configuration menu to display the Journal Migration Configuration dialog box. For more information, refer to the *Panagon* Fax online help.

## **Journal Log Files**

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 default journal log file name is \FaxEntry\Journal\FEJrn.log.

The Journal file contains the disposition of incoming data and records one entry for each piece of data output.

## **Journal Entry Format**

Entries in the journal log use the following format:

type mm/dd/yyyy hh:mm:ss <CallerID><ch(annel)> <DID/DTMF> <pages><document/batch ID> <status>

**Type** Type can be RECV (migrated inbound fax), LOG (mi-

grated journal log entries) or FILE (migrated file en-

tries).

mm/dd/yyyy Represents the date that the request was migrated.

hh:mm:ss Represents the time the request was migrated.

Caller ID Indicates the Customer Subscriber Identification num-

ber, i.e., the telephone number of the sending device.

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:

http://www.css.filenet.com/documentation

Ch(annel) Represents the channel number or fax device port num-

ber that the call came in on.

#### DID/DTMF

If your 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 user. DID can also be used for indexing information.

If your telephone service supports DTMF (Dual Tone Multiple Frequency), the caller can enter a configurable number of digits (usually a four-digit extension). The Network Fax Server will use the data to route the fax to its destination, route it to a document class, or use the data for indexing information.

### **Page**

Indicates the number of pages in the migrated request.

**Doc/Batch ID** Represents the IDMIS-assigned document or batch identification number. If a committal request exists, a document ID is displayed. If there was no commit request, the Batch name displays.

#### Status

Indicates migration status. States include Commit, Index, Batch, or Error.

**Commit** Batch was successfully committed.

Index Batch is indexed, but not committed.

Batch Batch is assembled but not indexed.

#### Error

An error occurred during processing, possibly due to invalid automatic indexing values. The error status also displays if an error occurred at any other point during processing.

## Converting the Journal Log file to ASCII

To convert your Journal Log file from a binary file to an ASCII text file, use one of the following methods:

- Select the option Convert Journal in the File pull-down menu. Specify the destination location for the log files in the Backup Directory parameter in the Journal Migration Configuration dialog box.
- Select the Journal Migration Configuration dialog box.

Specify the Backup Directory parameter to designate where you want both the binary and the ASCII text Journal Logs to be placed.

Set the Migration Option parameter to Backup or Backup and Commit.

## **Activity Trace Window**

The Activity Trace Window is used to trace the progress of fax transactions and is defined in the Trace Configuration dialog box. If you select the Detail Level parameter, you can determine what type of activity to trace as well as how much detail to record:

Normal Trace Records significant errors

**Detailed Trace** Records significant errors and related informa-

tion

Very Detailed Trace Records significant errors, journal entry informa-

tion, with additional steps and the status of

each.

This feature is particularly useful for troubleshooting purposes.

You can specify the maximum number of entries that can accumulate in the Activity Trace window in the Trace Window Max Entries parameter in the Trace Configuration dialog box. When the maximum is reached, original entries are overwritten by new entries in the window. Note that this parameter does not affect activity trace entries written to the Activity Trace file. The default is 200 entries. The range is 100 through 999 entries.

If you have checked the Trace File Enabled parameter in the Trace Configuration dialog box, fax transactions are saved in the file specified in the Trace File Name parameter. The default name is \FaxEntry\Journal\FETrace.log. You can enter a different file name and/ or path.

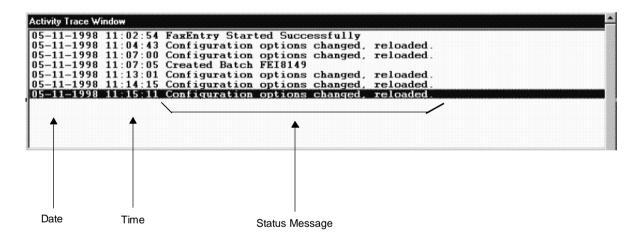
#### Note

Trace data will accumulate in this file until you disable this function. Therefore, you must periodically delete the file or archive it to prevent it from becoming too large.

Refer to the Panagon Fax Entry Online Help for field definitions.

To view this window, select the Activity Trace command from the Tools menu. This command is used to toggle the Activity Trace Window on or off.

The following illustration shows an active Activity Trace Window.



## **Switching Between Windows**

Although the Panagon Fax Entry window can display the Journal Window and Activity Trace Window at the same time, only one of these windows can be active. Information in both the active and inactive window is updated as an activity occurs.

To make a window active, either click on it or select it in the Window menu. Either method highlights the title bar in the active window.

Other common window commands accessed from the Windows menu include: Cascade, Tile Vertically, Tile Horizontally, and Arrange Icons.

#### Status Bar

The status bar at the bottom of the Panagon Fax Entry shows actions currently being performed.

### Clock

A rotating clock is on the left of the status bar, providing a visual indication that Panagon Fax Entry is operating. This clock is especially convenient when inbound fax activity is slow, since there may be no other visual indication that the Panagon Fax Entry is operating.

#### Note

If the clock is not rotating in the Panagon Fax Entry window, or if the logon icon (2) is not displayed on your Windows desktop, Panagon Fax Entry is no longer communicating with the IDMIS. If either of these situations occur, exit and restart Panagon Fax (it is not necessary to exit Windows NT).

## **Configuring Panagon Fax Entry**

Use the commands in the Panagon Fax Entry Configuration menu to view and change parameters on the following tabs:

- Journal migration configuration parameters
- Inbound migration configuration parameters
- File migration configuration parameters
- System configuration parameters
- Activity Trace configuration parameters

Normally these parameters are set during the installation. While the settings can be changed later, they usually remain as installed. Note that a few parameters are exceptions and will normally be reset by the user at a later time. These parameters are described as follows.

### **Enable Idle Time Period**

Use this feature to backup IDMIS without shutting the Fax Entry application down. You can specify the Enable Idle Time Period option on the System configuration tab in the Panagon Fax Entry Configuration and render the Fax Entry application idle.

Enable Idle Time Period allows you to back up the IDMIS during the time Fax Entry is inactive, without shutting the Fax Entry application down. The Enable Idle Time Period option uses military time and can be set within a 48-hour range, during installation or later during use.

For example, you can enter the time period, 22:00 to 30:00, rendering the Fax Entry application inactive from 10:00 P.M. on day 1 to 6:00 A.M. on day 2. At 30:00, Fax Entry will become active and again migrate inbound faxes to the IDMIS. The start time must be less than 24:00, that is, within day 1.

This option defines a time period when the Fax Entry application is idle. When the idle period ends, the application again begins to migrate inbound faxes to the IDMIS.

To configure this feature, refer to the *Panagon Fax Installation* Guide.

## **Display Important Messages**

In the System Configuration dialog box, if you check the field, Display Important Messages in Popup Boxes, important messages, derived from the Activity Trace Window, are displayed in a popup, processing is halted, and a user response is required to continue processing.

Do not use for unattended processing.

## **Storing Inbound Failed Faxes**

You can specify an error directory in which to store your failed inbound faxes. For example, a failed fax may be one that did not complete transmission.

The default is \FaxEntry\Error. Specify your error directory in the Error Directory field on the Inbound Migration Configuration dialog box. To change the default, enter a new directory or select the Browse button.

For information on configuration parameters, refer to the *Panagon Fax* Online Help.

## **Document Processing**

Document Processing is represented on both the File Configuration and Inbound Configuration dialog boxes.

Document Processing includes two checkboxes:

- Run DocProcessing Before Event Activator
- Run DocProcessing After Assembly

These options are enabled only if DocProcessing is installed. If not installed, the options are disabled. If DocProcessing is installed, neither, either, or both of the options can be checked.

## Run DocProcessing Before Event Activator

If the DocProcessing Before Event Activator checkbox is checked, DocProcessing is run after Fax or File Import and before the Event Activator. Use this to clean up images and for bar/patch code detection. DocProcessing can set attributes that are used by the Event Activator to decide where to make batch and document divisions.

For example, DocProcessing may detect a patch code on a page that indicates a certain document type. It would then set an attribute, indicating that the patch code was found. The Event Activator would note the patch code and, based on its rules, mark the page as start-ofbatch. Assembly would then move the page(s) into a new batch.

## Run DocProcessing After Assembly

If the DocProcessing After Assembly checkbox is checked, DocProcessing is run after Assembly, even if Indexing and Committal will not be run. Use this if the required processing is to be applied only to a certain document type.

For example, Assembly (with the help of the Event Activator and possibly DocProcessing) may move a particular document type into a separate batch. Assembly can assign a new settings collection to the batch. Generally, this option is useful when Assembly separates document types into different batches and assigns a settings collection to each.

## **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:

oustomer information	VIII.
Company name:	Date:
Site ID:	_ Your name:
Phone:	-
Problem Description	n:
Describe the problem:	

## 4 Problem Reporting

Fax Server Problem Report Form

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 repro				
Impact of problem:	Critical	Serious	Annoyance	e 🔲
Is there a workaround? If yes, describe the worka	round:			<u>-</u> -
Describe the state of the				
Error messages displayed	d on the Fax Server:			
Error message on FileNE				
Errors logged in FileNET	IDMIS server error logs	S:		

System:		
Manufacturer:		
Model:		
Processor used:		☐ Pentium ☐ Other:
Processor speed:		MHz
Additional memory (past	1 MB):	
Network:		
Network card	☐ Ethernet Model:	☐ Token Ring
If Other, describe:		

Fax Board:				
Board #	Board Type	☐ CP ☐ CPi	☐ CP100 ☐ CP4/LSI	
Board #	Board Type	☐ CP ☐ CPD ☐ CP4/T1	☐ CPi ☐ CP100 ☐ CP4/LSI	☐ CPXPi☐ CP120
Board #	Board Type	□ CP □ CPD □ CP4/T1	☐ CPi ☐ CP100 ☐ CP4/LSI	☐ CPXPi☐ CP120
Board #	Board Type	□ CP □ CPD □ CP4/T1	☐ CPi ☐ CP100 ☐ CP4/LSI	☐ CPXPi☐ CP120
Board #	Board Type	☐ CP☐ CPD☐ CP4/T1	☐ CPi ☐ CP100 ☐ CP4/LSI	☐ CPXPi☐ CP120

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	C:\FAXINST.LOG
Transmitting a particular image file to a remote site	The image file
	The actual faxed page (if possible)
	Verbose log
	All of these files:
	\FNSW_LOC\TMP\*.2PS
The fax server hanging	The IDMIS system log file
Adding an on-image note	The actual faxed page (if possible)
	All files related to the trouble request in the C:\FNSW_LOC\MI-GRATE directory
Document committal	Activity trace file:
	x:\FaxEntry\Journal\FETrace.log
	Fax Manager Journal Log file
	Panagon Fax Entry Journal Log file
	x:FaxEntry\Journal\FEJrn.log

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