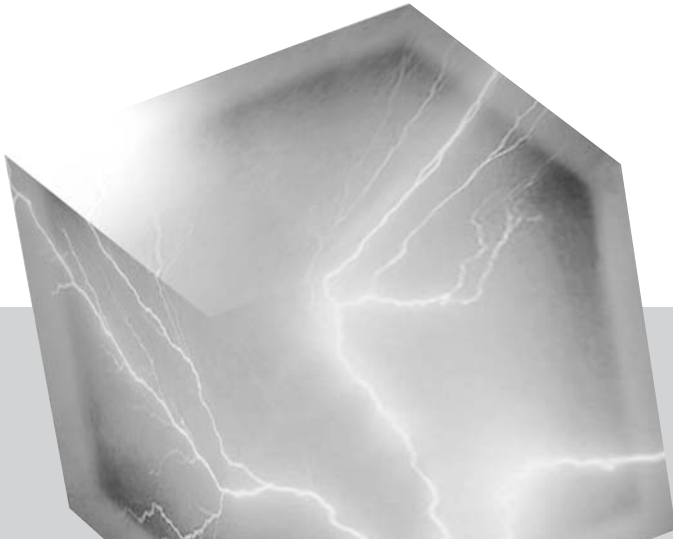




Interstar

LightningFAX

ENTERPRISE FAX SERVER



Getting Started

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Acknowledgments:

This product includes software developed by the Independent JPEG Group (IJG) (<http://www.ijg.org/>).

Interstar Technologies Inc.

Version Number 8.2A

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Customers:

If you are a customer with a valid **Maintenance & Support** contract:

- Please call the main telephone number and ask for Technical Support;
- Specific questions may be sent by email to: support@interstarinc.com.

Non-Customers:

If you are not a customer and you do not have a local Interstar Partner:

- Specific questions may be sent by email to: presales@interstarinc.com.

If you are not a customer and you have a local Interstar Partner:

- Please call your local Interstar Partner;
- To find out who your local Interstar Partner is, please send an email to: presales@interstarinc.com.

The demonstration version

The demonstration version provides the full LightningFAX functionality to unlimited users for 30 days, with a maximum of 2 live fax channels. All faxes sent with the demonstration version are watermarked.

The installation procedure also offers a feature called the **Virtual Board**, which can be selected for testing purposes. The Virtual Board makes it unnecessary to install a fax board. It provides 24 channels, 12 send and 12 receive. For evaluation purposes, Interstar recommends that this feature be selected.

Licensing

The LightningFAX license is tied to the server it is installed on, based on the value of its network card's MAC Address.

Please provide Interstar with your server's MAC address prior to the installation; we will in turn provide you with a license file, which you will be asked to provide during the installation.

Introduction

This guide details the installation and requirements of the LightningFAX software. It also details configuration of the email gateways and client components.

Topics included are:

- Concepts and planning;
- Installation requirements;
- Installing the client;
- Configuring components;
- Pre-installation checklist;
- Installing the server;
- Configuring the gateways;
- Installing the forms for Microsoft Outlook.

Note: Only first-time installation and configuration procedures are presented in this booklet. For more information about adding or removing components, repairing defective installations, upgrading or uninstalling the software, consult the LightningFAX Administrator Guide.

Concepts and planning

A LightningFAX network can consist of a single server and a number of client workstations. Alternatively, the network may comprise two or more servers, each servicing a number of client workstations.

Multiple components are installed when LightningFAX is installed. Here is a brief description of the purpose of each component:

Server

The LightningFAX server controls and manages all user information, the fax message store, load balancing and all configuration settings for inbound auto-routing and outbound least-cost routing. The server manages all requests from all client workstations in the LightningFAX network and is the queue manager for incoming and outgoing faxes. The server is accessed through the LightningFAX client components.

Although they can be distributed, the LightningFAX server and driver components are usually installed together on a single computer.

Even while you're testing the product, do not install the LightningFAX fax server solution on a computer running another fax server solution.

Installation of the LightningFAX server also includes the **Feedback API**. The Feedback API is used to define actions to be executed when certain fax events occur. Once defined, these actions are associated with LightningFAX events, such as a new fax, a failed fax, a sent fax, etc... When the event occurs, the action is then executed. The Feedback API can be applied to all LightningFAX faxing interfaces.

Note: The Feedback API needs a separate license to work. Contact Interstar for more details.

Activity Log

The activity log is a script used by the Feedback API utility to monitor server activity. The Feedback API needs to be installed, for the activity log to be enabled.

Note: On Microsoft Windows NT 4.0, the Windows Scripting Host is installed along with the activity log.

Driver

The LightningFAX driver provides the interface between the server and the fax boards. Incoming faxes are received by the driver and sent to the server, which in turn distributes them to the various clients in the network. Outgoing faxes are sent from the server to the driver.

The driver is configured through the LightningFAX **monitor**, which is automatically installed along with the driver. A LightningFAX administrator can specify such information as the number of fax board channels, the fax board type and I/O settings, IRQ settings, etc... During installation, however, the auto-detect function of the driver usually automatically detects these settings.

Advanced services

Rasterization server

The rasterization server converts documents created by third-party applications to the **Tagged Image File Format (TIFF)**. It is used by components such as the email gateways, web access and ActiveX control. If your organization wishes to use any of these components, the rasterization server must also be installed.

Note: Interstar recommends that, to reduce overhead, the rasterization server not be installed on the same computer as the LightningFAX server.

The first rasterization server installed in an LightningFAX network is the master. When the volume of fax traffic becomes too demanding, a second rasterization server can be installed on another computer. When installing any rasterization server, you must enter the internet host name of the master rasterization server . The additional slave servers poll the master for jobs to execute.

Web access

The web access implements the functionalities of the web client, which allows users to send and receive faxes through Internet Explorer 5.0 or later.

Note: The LightningFAX web client can be used with Netscape Navigator 7.0 and later; however, certain display features may be affected.

CORBA server

The first component that is included in the web access is the CORBA server. It is the link between the web pages and the LightningFAX server. The web pages must be installed, for the CORBA server to be of use.

Web pages

The web pages are the second component in the web access. Together, they constitute what is known as the web client. To work properly, the web pages require the CORBA server, as well as some third party software (see Installing third party software on page 79), which are automatically installed as part of the LightningFAX web pages installation.

API service

The LightningFAX API service is a means of automating batch and broadcast faxing through a command file, normally used to integrate with third party and in-house applications. The command file contains information on fax recipients and the files to be faxed. Command files can be written directly or generated automatically using third-party applications. The API service supports both **Unicode** and **Multi-Byte Character Set (MBCS)** encoded files as command files.

PostScript and PCL converters

The PostScript and PCL converters are used by the API service and the rasterization server to convert Postscript, PCL and PCL5 files into TIFF format. They are installed automatically with the API service.

The email gateways for Microsoft Exchange and SMTP also use these converters, when they are configured to send notifications in the PDF format instead of TIFF. The converters are also installed automatically with any of these gateways.

Note: The installed PCL converter is an evaluation software.

PCL5 port monitor

The PCL5 port monitor is installed by default with the server, but its installation can be disabled. It comes with a readme, a configuration and a sample .doc file. The installation procedure copies the readme and configuration file to the `\lfapi` sub-directory of the main LightningFAX directory and installs the new port monitor. You must then install a new "HP Laser Jet" printer with the `LFPCLApi` as the port monitor.

When a converter file (generated with any text editor program) is printed on the PCL printer linked to the `LFPCLApi` port, the port monitor processes it. It converts the converter file into an API file (.api) and a PCL attachment file (.pcl). Additionally, for every attachment files, if any, it generates an attachment file (.cpy). All the generated files will then be routed to the API's `\ToConvert` directory where they are processed by the API.

Gateways

An email gateway provides a means of sending and receiving faxes through email client software. LightningFAX provides various gateways for:

- Microsoft Exchange;
- Simple Mail Transfer Protocol (SMTP) servers;
- SAP R/3 (This is a Legacy component).

Naturally, the gateway installed corresponds to the email software being used. It should also be underlined that different gateways have different installation requirements.

Once installed, no installation beyond the email client software is required on the computers used by the fax senders. All gateways are custom installations, although the gateway for SMTP is selected by default for the installation of LightningFAX server components. Most gateways are installed on the computer where the corresponding email server resides.

The following software must be installed, prior to the gateway installation:

- The LightningFAX server, client and rasterization server;
- The email server and client.

Client components

The LightningFAX client components are required to access and configure the LightningFAX server. They provide fax management functionalities for all users and user management for those users with administrative privileges.

Which client components are installed on the Windows client workstations is decided by the fax and fax management operations that you want users to perform. These components can be accessed through the LightningFAX manager, SendFAX or the Start menu.

If users are to manage fax transmission and reception with the LightningFAX manager and to send faxes using SendFAX, these components should be installed on each client workstation. These operations aside, installing the client allows users to take advantage of the phone book and other components. The cover sheet editor might also be installed.

However, some system administrators prefer that users fax through their email software. One of the gateways and the rasterization server would then be installed, instead of the client. A gateway should be installed on the same computer as the email server; the rasterization server should also be installed on any computer accessible to the computer where the gateway and email server reside.

Users can then use their existing email software to send and receive faxes, managing faxes as they do their email messages. It is unnecessary to install the client on their workstations.

Manager

To the administrator, the LightningFAX manager provides the interface for:

- ❑ Managing LightningFAX resources;
- ❑ Adding and managing users, groups and their properties;
- ❑ Setting profiles;
- ❑ Creating inbound auto-routing rules;
- ❑ Creating outbound least-cost routing rules.

All users can use the manager to manage their own incoming, outgoing and archived faxes.

Viewer

The viewer allows users to display, read, and annotate faxes. In addition, users can rearrange fax pages to generate another fax. It is automatically installed along with the fax manager. The viewer can be freely distributed to potential fax recipients.

SendFAX

SendFAX is the program used to compose, address, annotate, arrange, change transmission settings and send faxes. It is a simple interface allowing the user to see their fax before it is sent. SendFAX provides users with increased functionality when compared with sending faxes from an email client.

Tools

The tools installed with the LightningFAX client include the following:

Phone book

The phone book allows a user to organize and group fax recipients for easy selection in SendFAX. Any number of phone books can be created.

Cover sheet editor

Administrators and users can use the cover sheet editor to build fax cover sheet templates to be used when faxing with SendFAX. A selection of preformatted cover sheets is provided. Variables can be added to any cover sheet to include information such as; sender name, company name, address, telephone, fax number, etc...

User administration MMC snap-in

Note: This functionality is not available for Microsoft Windows 95/98/ME.

LightningFAX integrates seamlessly into Active Directory to allow centralized management of fax properties from the Microsoft Management Console (MMC). The Active Directory extension allows the Exchange administrator to configure various fax settings that will be used by LightningFAX when users send and receive faxes using Microsoft Exchange. This includes the ability to enable or disable faxing capabilities, to restrict access to any number combination, and to set the default cover sheets and the Direct Inward Dialing (DID) identifier for automatic routing.

This component requires that you first extend the Active Directory schema through the gateway for Microsoft Exchange installation, as in Extending the Active Directory schema on page 64.

Outlook addin

If the Microsoft Outlook user is able to create and use private profiles, the administrator must install the Outlook addin on the user's computer, after publishing the LightningFAX forms for Microsoft Outlook (see Forms for Microsoft Outlook on page 16).

Note: Microsoft Outlook must be the default email client.

The Outlook addin adds a folder named `XMPProfiles` for the user's private profiles. Installing the addin also introduces a  button to the Microsoft Outlook toolbar.

Users can display the fax composition form (if SendFAX is not installed) or launch SendFAX, by clicking this button. The composition form can also be displayed by making a menu selection.

ActiveX control

The ActiveX control can be used by customized scripts or fax-enabled applications to access LightningFAX services. Most of the functionalities available in the manager are available through the ActiveX control. Examples showing usage of the ActiveX control can be found on the installation CD.

Printer drivers

The LightningFAX printer driver is automatically added to the list of available printers during the client software installation. Users can send faxes from any Microsoft Windows-based third-party application, by selecting the LightningFAX printer driver after using the application's `Print` command. Executing the `Print` command launches SendFAX with the document included as a fax. The fax can then be addressed and sent.

Print-to-Web printer driver

The Print-to-Web printer driver allows users of any Windows application to fax through the web client by selecting the LightningFAX printer driver after using the application's `Print` command. Executing the `Print` command launches the web client. The user only needs to log in, enter an address and send the document.

Note: The Print-to-Web printer driver is only supported by Microsoft Internet Explorer 5.0 or later.

Print-to-Mail printer driver

The Print-to-Mail printer driver provides a means of emailing a file from a third-party application. When writing a document in a third-party application such as Word or WordPerfect, the user prints the documents and selects the Print-to-Mail printer. When the print operation is executed, the user's default email software is launched with the document attached as a TIFF. The user can then address and send the file as they would any other email message.

Legacy components

Public phone book server

Administrators can also make a public phone book available to a group of users. The public phone book is a legacy component that is not included with a client installation. Most customers do prefer to use their own email clients' integrated contact lists as they are fully supported in SendFAX.

The public phone book server provides users with access to a public phone book through the TCP/IP connection. This is included for legacy customers who have already setup the public phone book server and wish to continue using it.

HP LanFax service

The LanFax scanner service for the Hewlett Packard Digital Sender allows users to fax TIFF files generated by the Hewlett Packard Digital Senders which integrate with LanFax products. The fax operation takes place through the Digital Sender's interface. The LanFax service is a custom installation.

Other components

Forms for Microsoft Outlook

The LightningFAX forms for Microsoft Outlook provide a faxing interface within Outlook. The installation of forms creates an `Organizational Forms Library` and publishes a series of LightningFAX organizational forms. These include a fax composition form, several notification forms and forms for both public and private profiles.

These forms require that the gateway for Microsoft Exchange and the rasterization server be installed on the network. The user's computer must also be able to access both the Exchange and the LightningFAX servers.

Note: Microsoft Exchange and Outlook 98 or later must be installed on separate computers. Outlook 2003 must not be set in "Cached Exchange Mode" or offline mode when publishing the forms.

They can work alone in Outlook or along with the Outlook addin, or in SendFAX. SendFAX then becomes the faxing interface. That is, although the other forms just described remain available, the fax composition form is replaced by SendFAX.

You only need to publish the forms once, to make them available to all Outlook users. They are not available as part of the client components installation procedure. They can be installed using the procedure shown in Publishing the forms for Microsoft Outlook on page 82.

Forms for Lotus Notes

The LightningFAX forms for Lotus Notes provide a faxing interface within Domino.

These forms require that the gateway for SMTP be installed on the network. The user's computer must also be able to access the Lotus Note server.

You only need to install the forms once, to make them available to all Domino users. They are not available as part of the client components installation procedure. They can be installed using the procedure shown in Installing the forms for Lotus Notes on page 85.

Mail Merge for Microsoft Word

Mail Merge for Microsoft Word allows users to use Word to generate a **Main Document** template, specify a **Data Source** and then fax to all the recipients listed in it.

Note: Before installing Mail Merge, you must enable the macros in Microsoft Word, by starting it and selecting **Tools** ➔ **Macro** ➔ **Security**, and choosing the **Low** option in the dialog that appears. Once the installation is over, you should reset this function to its initial setting.

When installed, Mail Merge for Microsoft Word adds a macro and a button to the Word toolbar. It is not available as part of the client components installation procedure. It can be installed from the CD, in the `\Windows\Redist` folder, by opening `lfmerge.doc` in Microsoft Word and clicking the **Install the LightningFAX macros** button.

Pre-installation checklist

- 1 What are the specifications of the computer that will be hosting the LightningFAX server?
(Processor, memory, hard drive, OS)

- 2 What are the specifications of the computers that will be hosting the LightningFAX clients?
(Processor, memory, hard drive, OS)

- 3 What is your email server?

Microsoft Exchange

Version: _____

SMTP

None

4 What kind of PSTN connection do you have with your TELCO? (Analog, PRI, RBS)

T1 RBS

T1 PRI ISDN

Analog

E1

E1 BRI

5 What make and model is your fax board?

Brooktrout _____ Dialogic _____ None

6 What kind of PCI slots will be available in the hosting computer?

PCI-X

3.3V

5.0V

7 How many pages do you plan to send per day?

0-100

200-500

500 +

- 8 During your peak faxing period, how many faxes do you plan on sending and receiving and within what time frame? _____ Faxes in _____.
- 9 What is the MAC address of the computers which will be hosting the LightningFAX server or any other components? _____

How to determine the MAC address:

In a "Command Prompt" window, type:

"ipconfig /all" <enter>

Copy the value of "Physical Address" for the Network Card presently being used.

e.g.: "00-20-18-88-D2-BA"

Provide this value to your Interstar sales representative.

Network requirements

Network requirements are:

- ❑ Telephone company services;
- ❑ Brooktrout or Dialogic intelligent fax board with a maximum of 120 lines.

More than one fax board from either or both manufacturers can be combined on the same server.

Note: Most fax boards are full length cards, which necessitate full length PCI slots. The fax boards supported by LightningFAX are listed in Appendix C of the LightningFAX Administrator Guide.

Server requirements

Computers where the LightningFAX server is installed must run:

- Windows 2000 or 2003 Server;
- Internet Explorer 5.0 or later;
- Microsoft Office 2000 or later (for the rasterization server);
- Terminal servers.
- Internet Information Services 5.0 or later (for the web access);
- TCP/IP protocol.

Note: Windows NT 4.0 is no longer supported by Interstar, for server installations only.

Interstar recommends the following for the installation of server components:

Number of Lines	Processor	RAM Memory	Hard Drive
48	Pentium III - 1GHz	512 MB	<input type="checkbox"/> 40GB SCSI Ultra wide
96	Pentium IV - 1GHz	1GB	<input type="checkbox"/> 60GB SCSI Ultra wide
192	Dual Pentium IV - 2.4GHz	1.5GB	<input type="checkbox"/> 80GB SCSI Ultra wide
240	Dual Pentium IV - 2.8GHz	2GB	<input type="checkbox"/> 100GB SCSI Ultra wide

Fax Storage

Space to store faxes can only be roughly estimated. The average fax page is 35 to 50 KB after compression. Size varies depending on the extent and complexity of the content. Note that graphics-intensive pages can be hundreds of kilobytes in size.

Client requirements

The client workstations in a LightningFAX network require:

- Windows 95/98/ME /XP/NT/2000/2003;
- Internet Explorer 5.0 or later;
- TCP/IP protocol.

Note: The Microsoft Dun 1.3 and Winsock2 Year 2000 Update must be installed before you install any LightningFAX client on a computer running Windows 95. The update can be found at www.microsoft.com/windows95/downloads under Networking.

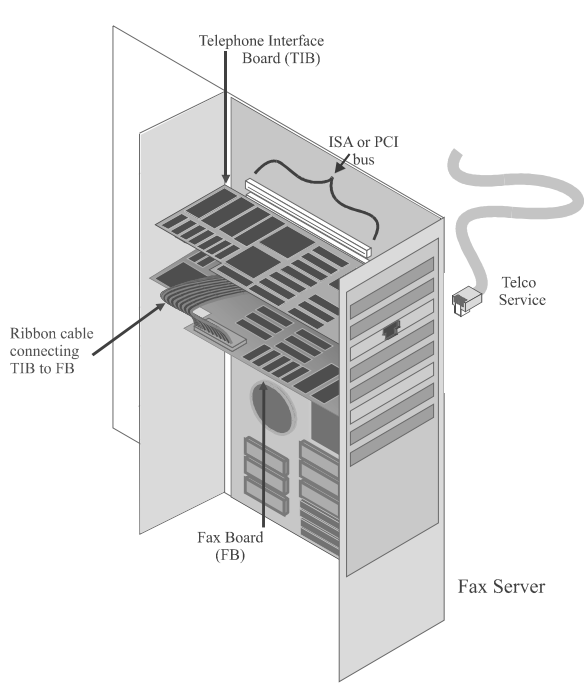
Interstar recommends the following for the installation of client components:

Processor	RAM Memory	Hard Drive
Pentium class or equivalent; Sufficient for usual Windows operation; <input type="checkbox"/> 35 MB for program files.		

Installing fax boards

As stated earlier, the services of a telephone company are required. Some fax boards include their own **telephone interface board (TIB)**. However, unless you are using all-in-one fax board, you must install both a telephone interface board and the fax board.

All-in-one boards (**Brooktrout TR1034**, for example) do not require a telephone interface board.



The following table details compatible telephone company services, TIB's and fax boards:

Telco Services	Fax Board
T-1 robbed bit	Brooktrout TR1034 T-1 (24 lines)
T-1 ISDN North America	Brooktrout TR1034 T-1 (23 lines)
T-1 ISDN Europe	Brooktrout TR1034 E-1 (30 lines)

Installing Dialogic GammaLink fax boards

You should consult your Dialogic GammaLink documentation for detailed instructions on installing those fax boards.

Note: Installation of a Dialogic GammaLink board requires the SR5 software, optionally installed with the installation of LightningFAX.

Also, if you modify gamma registry keys to customize the configuration of Dialogic boards, be aware that saving the setup options in the LightningFAX monitor deletes all the gamma registry keys and re-creates them, based on the settings in the monitor. If you want to save these custom configurations, you need to export them to a registry file (name it `Dialogic.reg`) and put it in the `\lfdriver` sub-folder of the main LightningFAX directory, before saving your changes in the monitor. The latter will automatically re-apply these configurations to the registry when you click OK.

Channel settings for Dialogic PCI fax boards

Dialogic GammaLink analog PCI fax boards are plug-and-play. You need only install these fax boards in your computer. The LightningFAX installation procedure will detect and properly configure them.

Installing Brooktrout fax boards

You should consult your Brooktrout documentation for detailed instructions on installing those fax boards.

Note: Optional Brooktrout diagnostic tools are provided on the LightningFAX CD, in the `\3rd\Brt\Tools` directory. Please refer to each tool for usage instructions.

Configuring Brooktrout PCI fax boards

PCI Brooktrout fax boards, whether analog or digital, are plug-and-play. You need only install these fax boards in your computer. The LightningFAX installation procedure will detect and properly configure them.

Note: When LightningFAX is installed with Brooktrout fax boards, the driver generates a specific log file for debugging the Brooktrout API, similar to the other driver log files. It is called `BrooktroutDebug.log` and can be found in the `\Trace` subdirectory of the LightningFAX root directory.

Installing the server

This section details typical first-time installations of the LightningFAX server.

Note: The user performing the installation of the server must have read/write access to the Active Directory, including the Microsoft Exchange service nodes.

At least one server installation must precede the installation of any gateway or client component. However, by default, some client components are installed automatically with the server installation (unless specified otherwise). Those are: the fax manager, SendFAX, the phone book, the cover sheet editor and the ActiveX control. All the other client components may also be installed with the server, by specifically selecting them. Some of these require special configurations or the installation of third party software, as detailed in [Installing third party software on page 79](#).

The installation procedure generates a log file which can be found in the `\Trace` sub-directory of the root LightningFAX directory. The name of the file is `LFInstallLog.log`. Each subsequent installation of LightningFAX components appends to this file.

Furthermore, Office Assistant should not be installed on a computer where a rasterizer server is located, since it can interfere with rasterization. If it is present, it should be uninstalled. It can however be installed on any other client workstation.

- 1 Insert the LightningFAX CD in the appropriate drive.
- 2 If the **Autorun** feature is enabled on the computer you are installing to, the LightningFAX splash screen appears.

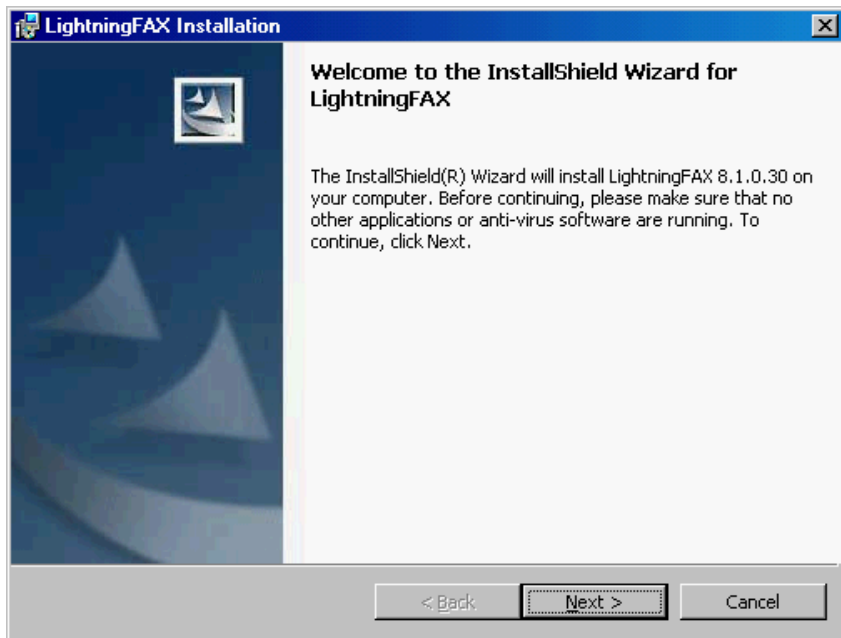
Otherwise, browse to the root directory of the LightningFAX CD and double-click Setup.exe.

- 3 Click `View release notes`, if you wish to display and review the software release notes before installing.
- 4 In the splash screen, click `server`.

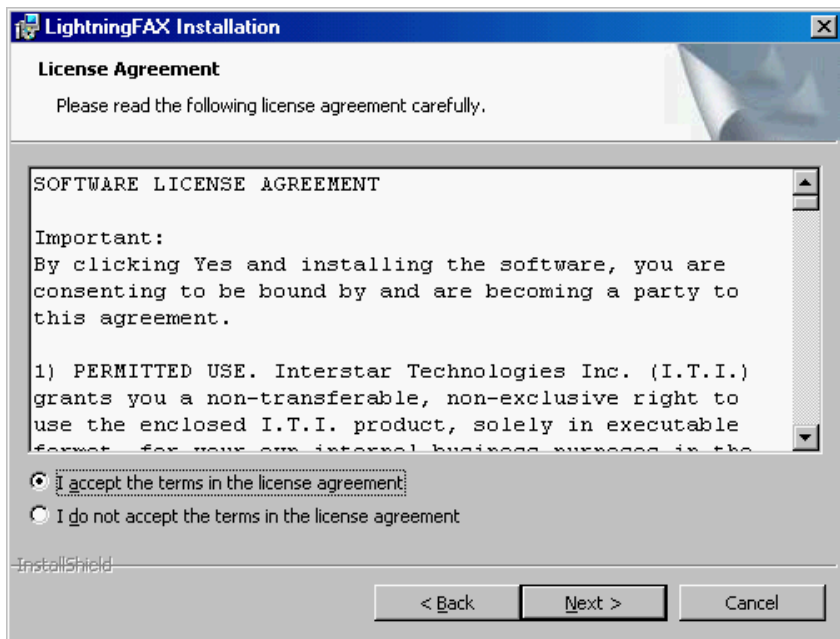


- 5 After a few seconds, the following dialog appears:

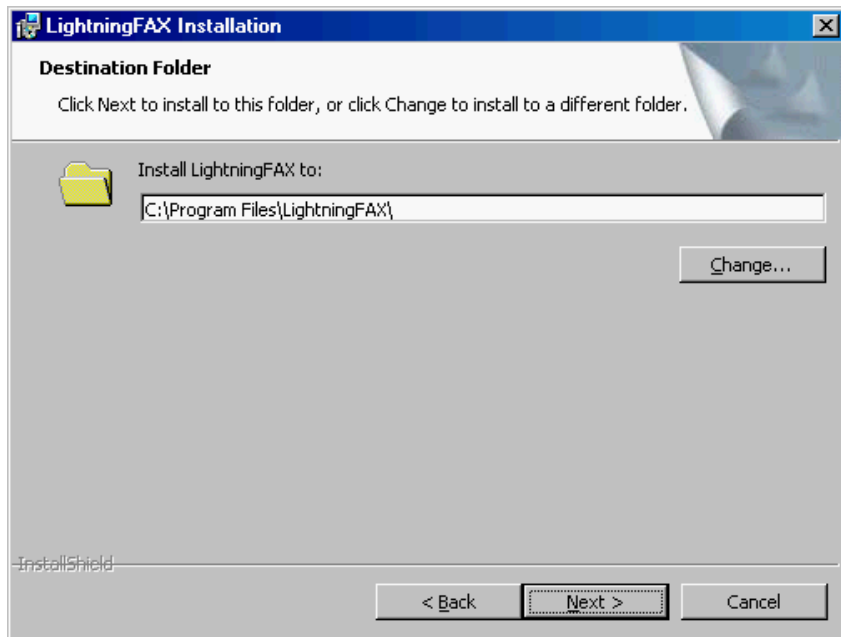
Wait until the button is enabled, and click **Next**.



- 6 Select the I Accept the terms in the license agreement option.
- 7 Click Next.



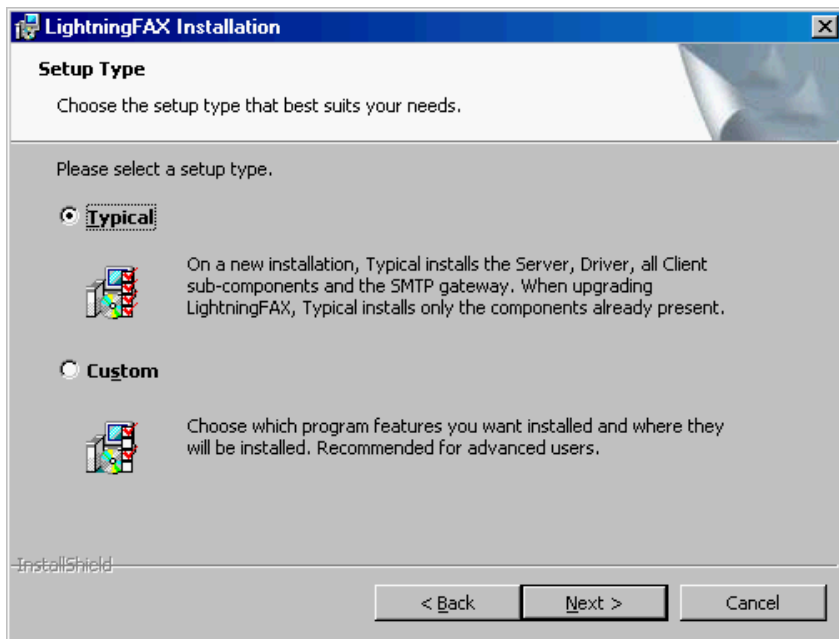
- 8 Click Change if you want to change the destination folder and browse to the desired location. Otherwise click Next.



- 9 Select the **Custom** option, if you wish to install email gateways or advanced components.

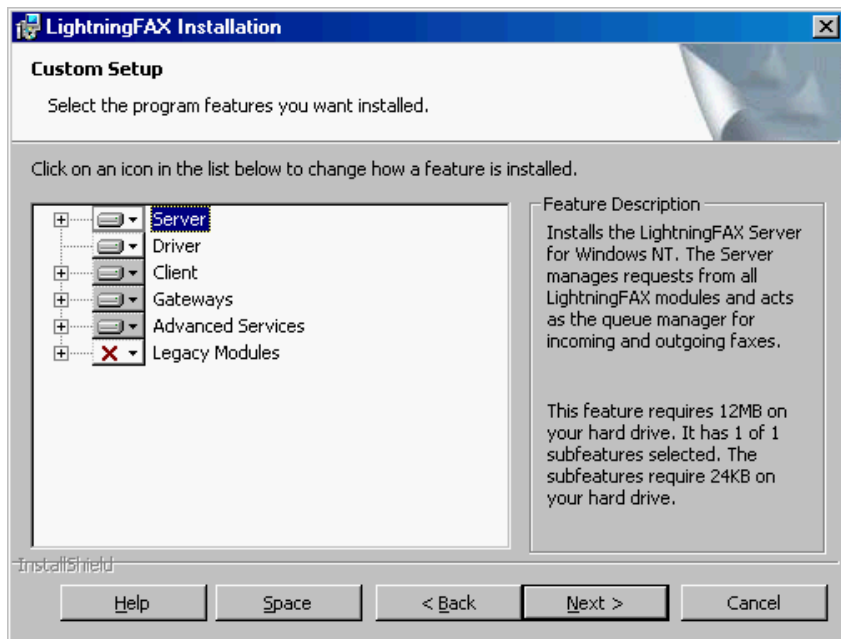
Select **Typical** to install the server, driver, client, rasterizer server and gateway for SMTP.

- 10 Click **Next** (If you selected the **Typical** option, you may skip to step 12 of this procedure).



- 11 The server, driver, gateway for SMTP and raserization server are selected by default, as well as the following typical client components: fax manager, SendFAX, phone book, cover sheet editor and ActiveX control.

Choose the components that you need by clicking on them and selecting This feature, and all subfeatures, will be installed on local hard drive.

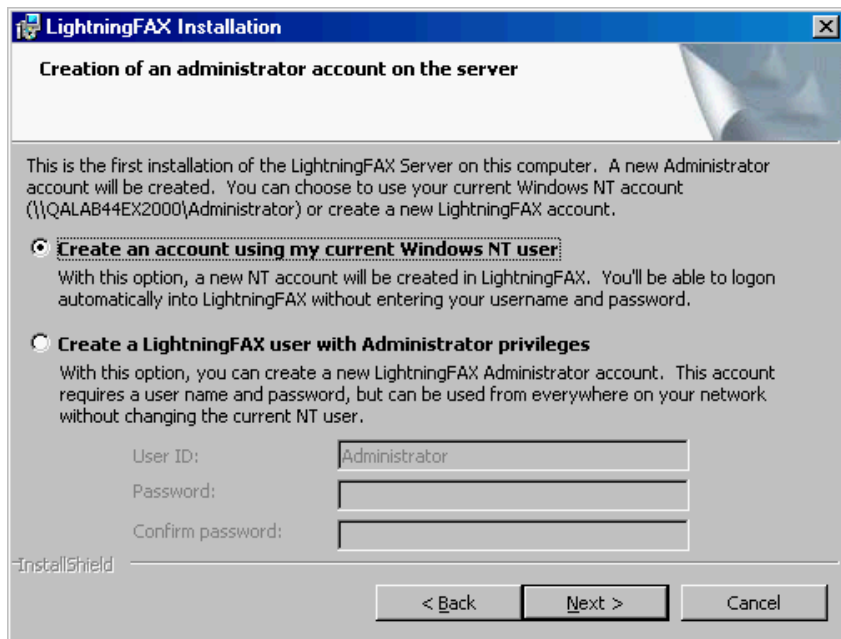


Deselect components only if you do not need to install them. Some components may require extra configurations or the installation of third party software, as detailed in Installing third party software on page 79.

12 Click `Next`.

- 13 Select the Create an account using my current Windows NT user option, if you want to log into LightningFAX using your Windows domain account.

Select Create a LightningFAX user with Administrator privileges to create a LightningFAX administrator account to log in with after the installation is completed (It is a good practice to have at least one administrator user which is not a NT Account user).

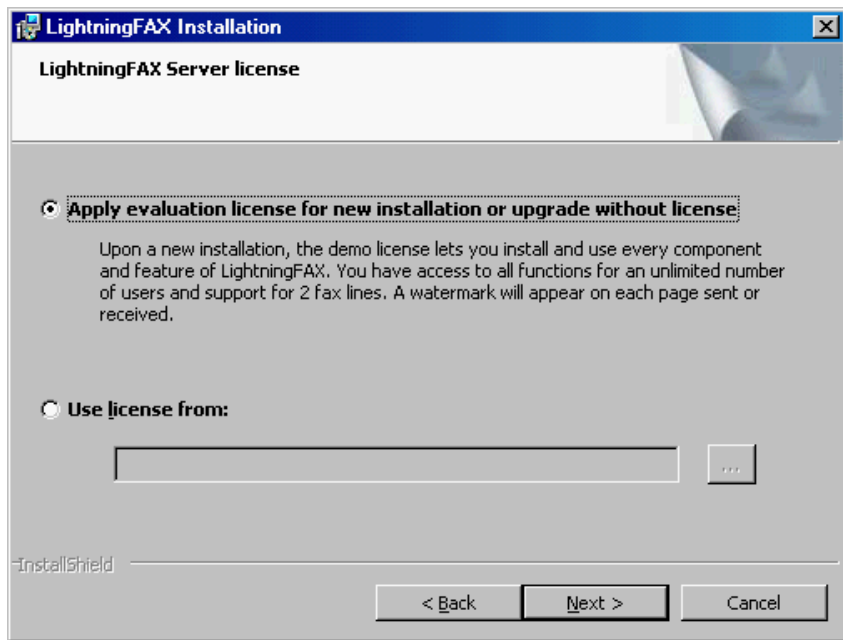


The screenshot shows a Windows-style dialog box titled "LightningFAX Installation". The main heading is "Creation of an administrator account on the server". The text inside reads: "This is the first installation of the LightningFAX Server on this computer. A new Administrator account will be created. You can choose to use your current Windows NT account (\\QALAB44EX2000\Administrator) or create a new LightningFAX account." There are two radio button options. The first option, "Create an account using my current Windows NT user", is selected. Below it, a note says: "With this option, a new NT account will be created in LightningFAX. You'll be able to logon automatically into LightningFAX without entering your username and password." The second option is "Create a LightningFAX user with Administrator privileges", with a note: "With this option, you can create a new LightningFAX Administrator account. This account requires a user name and password, but can be used from everywhere on your network without changing the current NT user." Below the options are three input fields: "User ID:" with the text "Administrator", "Password:", and "Confirm password:". At the bottom left is the "InstallShield" logo. At the bottom right are three buttons: "< Back", "Next >", and "Cancel".

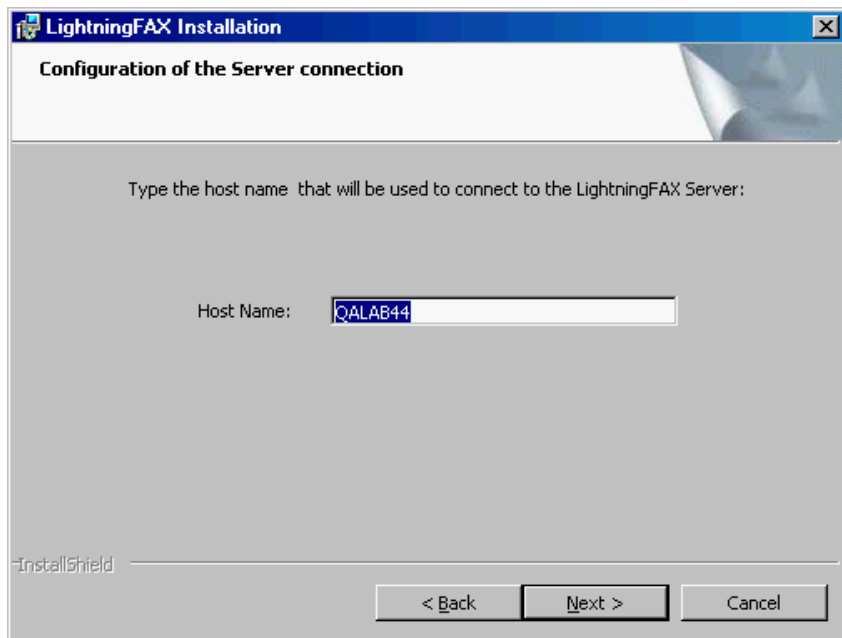
- 14 Click Next.
- 15 Select Apply evaluation license for new installation or upgrade without license, to use the demonstration version.

Select Use license from:, browse to the directory where the full license provided by Interstar is located and select it.

- 16 Click Next.



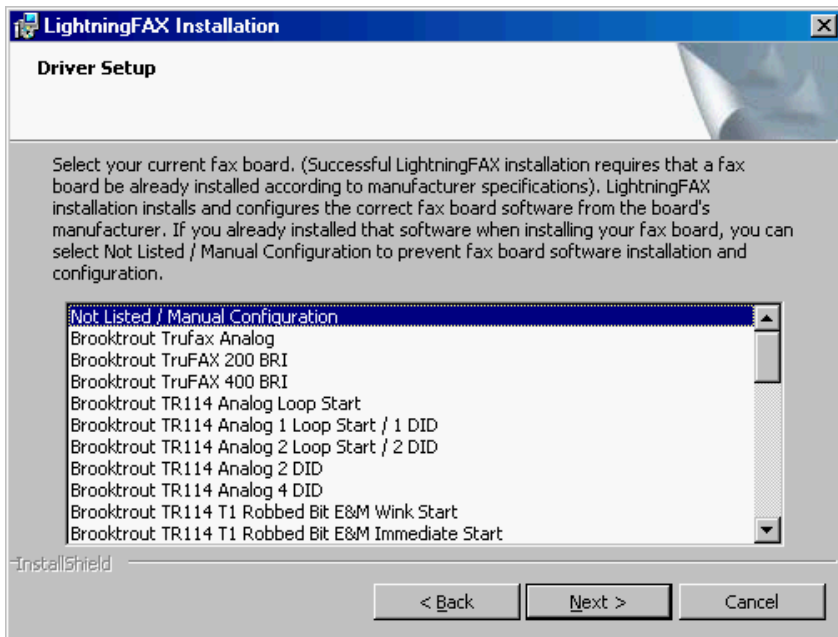
- 17 Ensure that the host name of the fax server was correctly detected.
- 18 Click Next.



- 19 Select a fax board that you want to integrate with LightningFAX, from the available list.

You may also select Not Listed/Manual Configuration, if your fax board is not in the list or if you prefer to configure it later, or the TeleVantage PlugIn, or the Virtual Board, for demo purposes only.

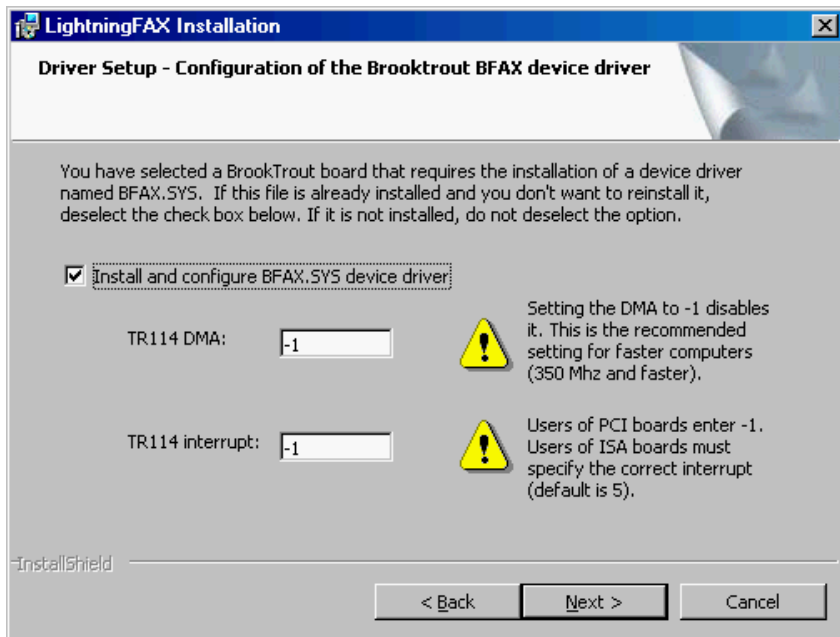
- 20 Click Next (If you selected the Not Listed/Manual Configuration, TeleVantage PlugIn or Virtual Board options, you may skip to step 22 of this procedure).



21 If you select an analog or TR114 Brooktrout fax board, the following dialog appears.

Check the `Install` and `configure BAFX.SYS` device driver box, if required.

If this is the case, enter the respective values for the DMA and the interrupt, in the appropriate fields.



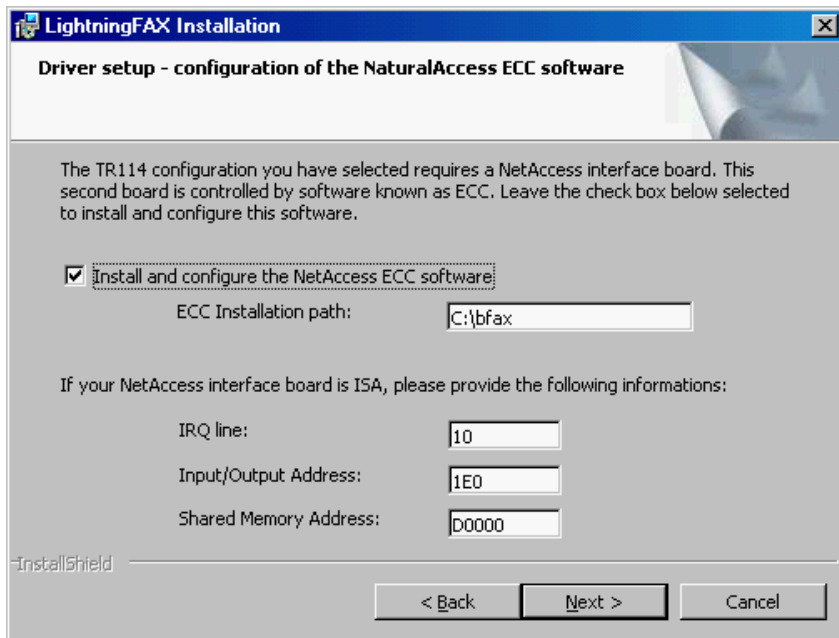
If you select a Brooktrout TR114 ISDN fax board, the following dialog also appears.

Check the **Install and configure the NetAccess ECC software** box, if required.

If this is the case, enter the path and directory where to install the software, in the **ECC Installation path** field.

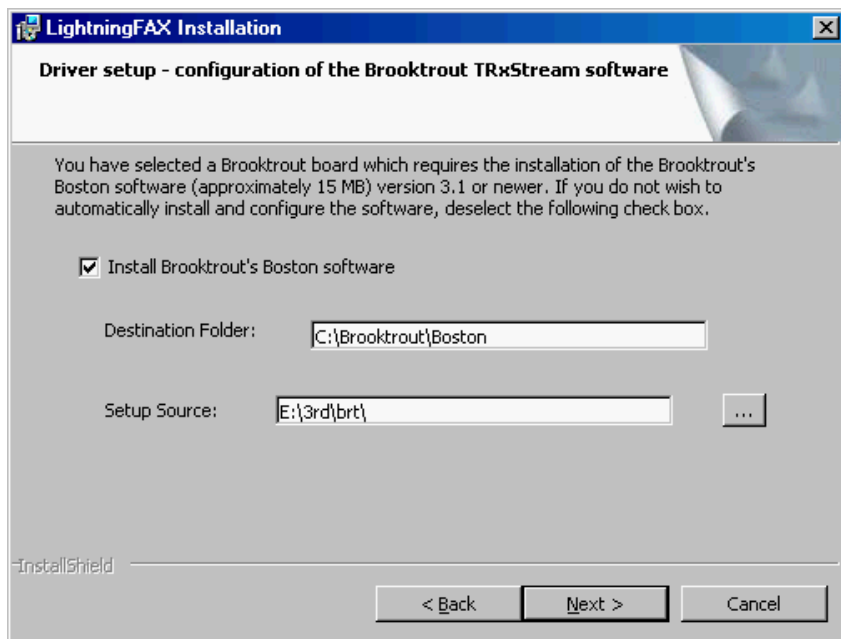
If you are configuring an ISA fax board, change the **IRQ line**,

Input/Output Address and **Shared Memory Address** fields, if required.



If you select a TruFAX BRI or TR1034 Brooktrout fax board, the following dialog appears.

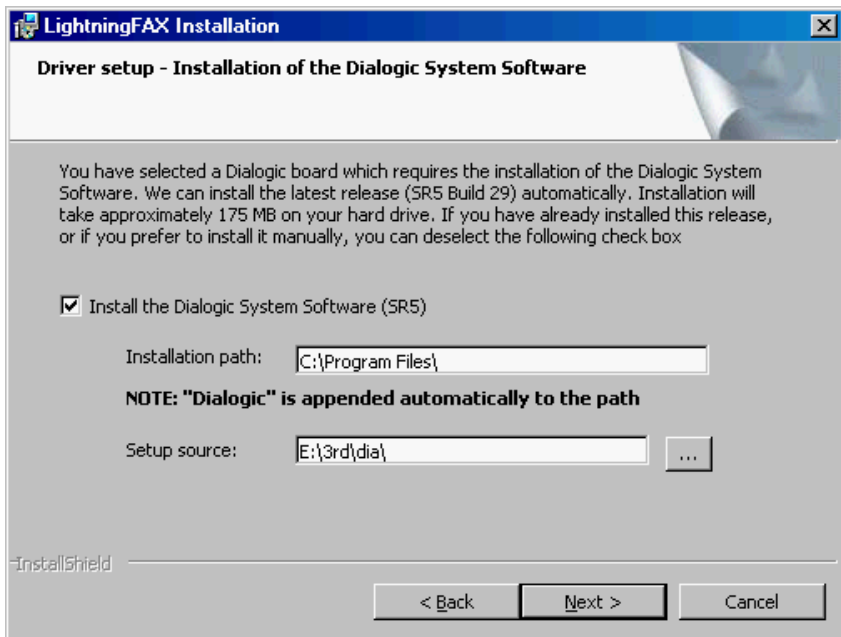
Check the Install Brooktrout's Boston software box, if required, and if so, change the Destination Folder or the Setup Source, if need be.



If you select a Dialogic fax board, the following dialog appears.

Check the Install the Dialogic System Software (SRS) box, if required, and if so, change the Destination Folder or the Setup Source, if need be.

22 Click Next.

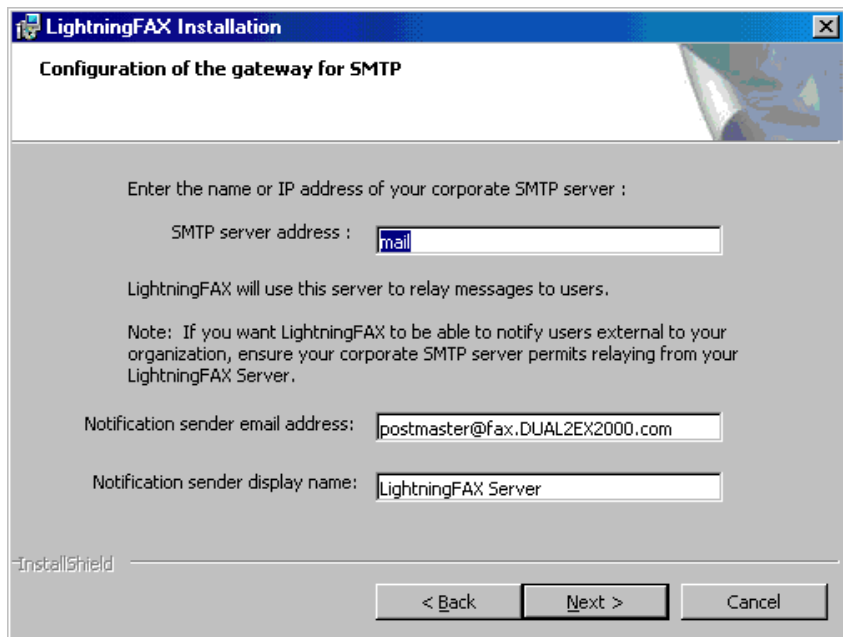


23 Since the gateway for SMTP is being installed by default, it needs to be configured.

If you opted not to install it, skip to step 24 of this procedure.

Otherwise, follow the configuration procedure introduced in Gateway for SMTP on page 58.

24 Click Next.

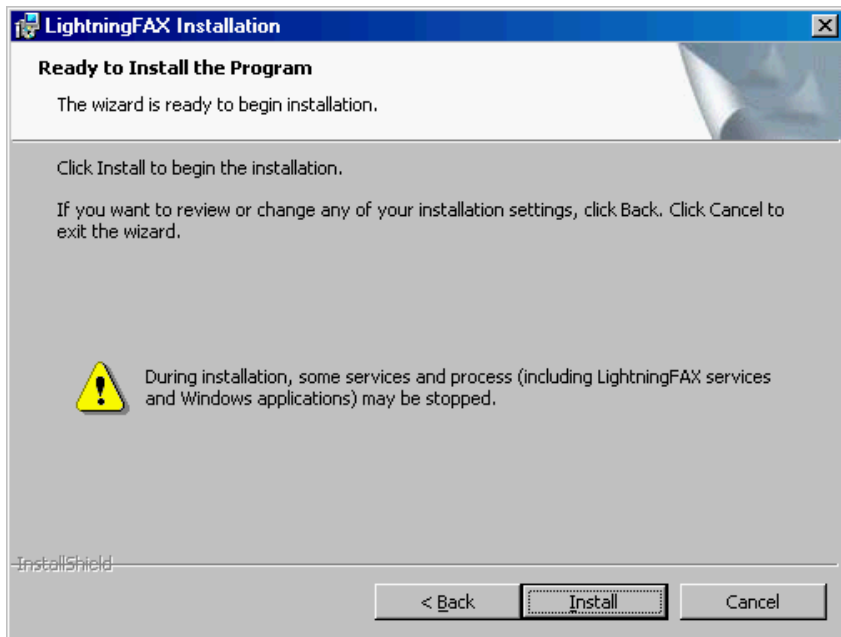


The screenshot shows a Windows-style dialog box titled "LightningFAX Installation" with a sub-header "Configuration of the gateway for SMTP". The dialog contains the following text and fields:

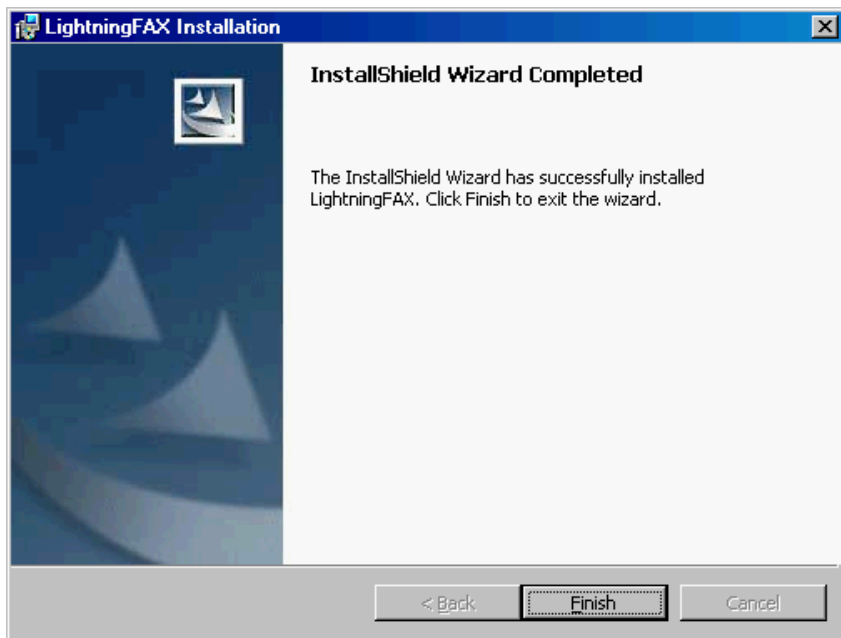
- Text: "Enter the name or IP address of your corporate SMTP server :
- Text: "SMTP server address :"
- Text input field: "mail"
- Text: "LightningFAX will use this server to relay messages to users."
- Note: "Note: If you want LightningFAX to be able to notify users external to your organization, ensure your corporate SMTP server permits relaying from your LightningFAX Server."
- Text: "Notification sender email address:"
- Text input field: "postmaster@fax.DUAL2EX2000.com"
- Text: "Notification sender display name:"
- Text input field: "LightningFAX Server"
- Text: "InstallShield" (with a progress bar)
- Buttons: "< Back", "Next >", and "Cancel"

25 Click Install.

It will take a few minutes for the installation to complete. You can observe the progress, however, with the status bar that is displayed.



26 Click **Finish** when the installation is completed.



Installing the client

This section describes the installation of the LightningFAX client. The client installation is intended for users who are to transmit faxes using SendFAX and to manage incoming and outgoing faxes through the fax manager.

Note: It is assumed that the server components — the server, driver and client — have already been installed and that no component other than the end user's client is being installed.

The installation of client components is accomplished by either of two overlapping procedures: the typical installation or the custom installation.

Typical installation

The typical installation of the client installs the following components:

- Fax manager;
- SendFAX;
- Phone book;
- ActiveX control.

Custom installation

The custom installation of the client is used to install any combination of the four typical components and the following advanced components:

- Cover sheet editor;
- User administration MMC snap-in (not available for Microsoft Windows 95/98/ME);
- Outlook addin;
- Print-to-mail printer driver;
- Print-to-web printer driver.

It is intended to accommodate users who require all components or only a partial installation. Partial installations are those that require fewer components than are installed by the typical installation. For example, SendFAX provides a broader range of functionality to users of the gateway for Lotus Notes. When that is necessary, the custom installation of the client can be used to install only SendFAX on workstations of Lotus Notes users.

Although less likely, it is possible that the LightningFAX manager alone could be installed, in the case of a super-user who routes faxes to other users in the network, but never actually sends faxes.

- 1 Insert the LightningFAX CD in the appropriate drive.
- 2 If the **Autorun** feature is enabled on the computer you are installing to, the LightningFAX splash screen appears.

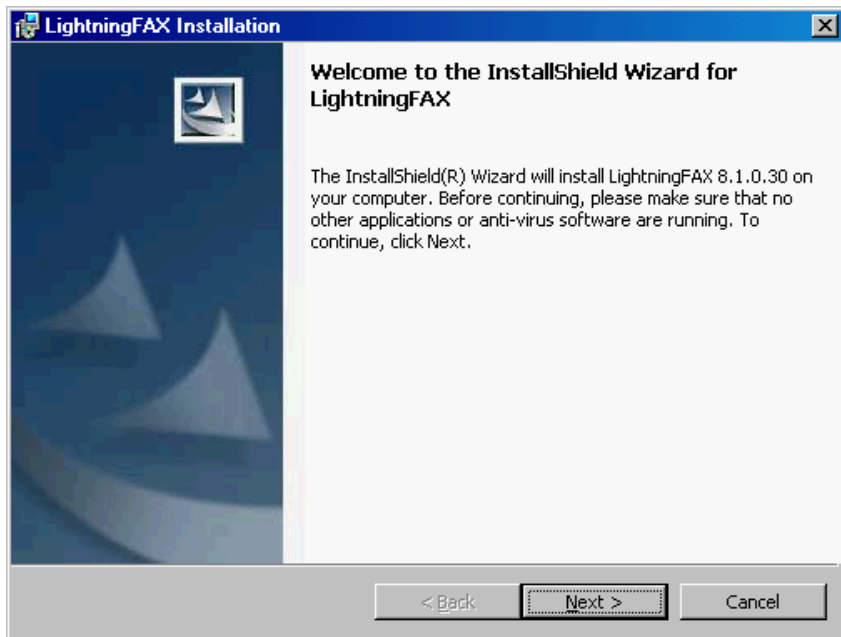
Otherwise, browse to the root directory of the LightningFAX CD and double-click `Setup.exe`.

- 3 Click `View release notes`, if you wish to display and review the software release notes before installing.
- 4 In the splash screen, click `client`.

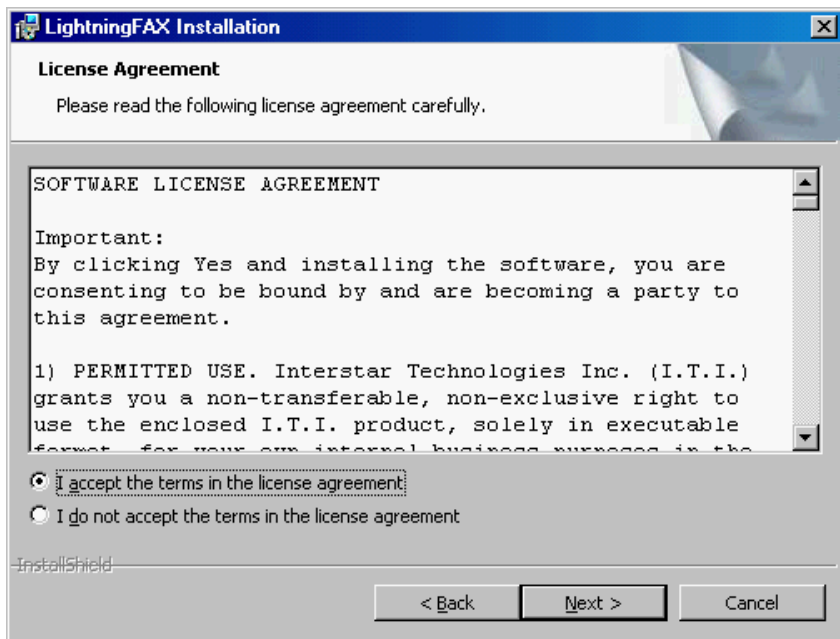


- 5 After a few seconds, the following dialog appears:

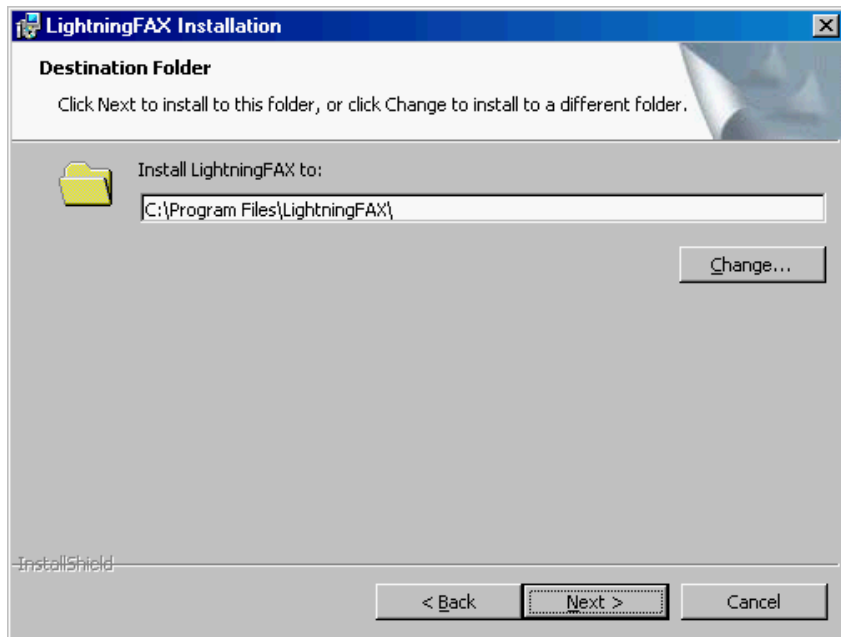
Wait until the button is enabled, and click **Next**.



- 6 Select the I Accept the terms in the license agreement option.
- 7 Click Next.



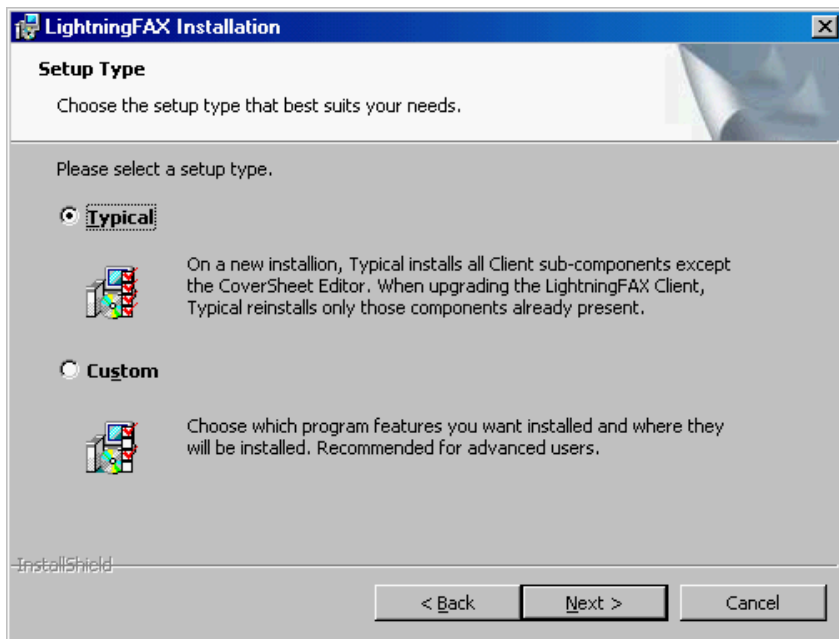
- 8 Click Change if you want to change the destination folder and browse to the desired location. Otherwise click Next.



- 9 Select the **Custom** option, if you wish to install a particular combination of client components.

Select **Typical** to install only the fax manager, SendFAX, the phone book and the ActiveX control.

- 10 Click **Next** (If you selected the **Typical** option, you may skip to step 12 of this procedure).

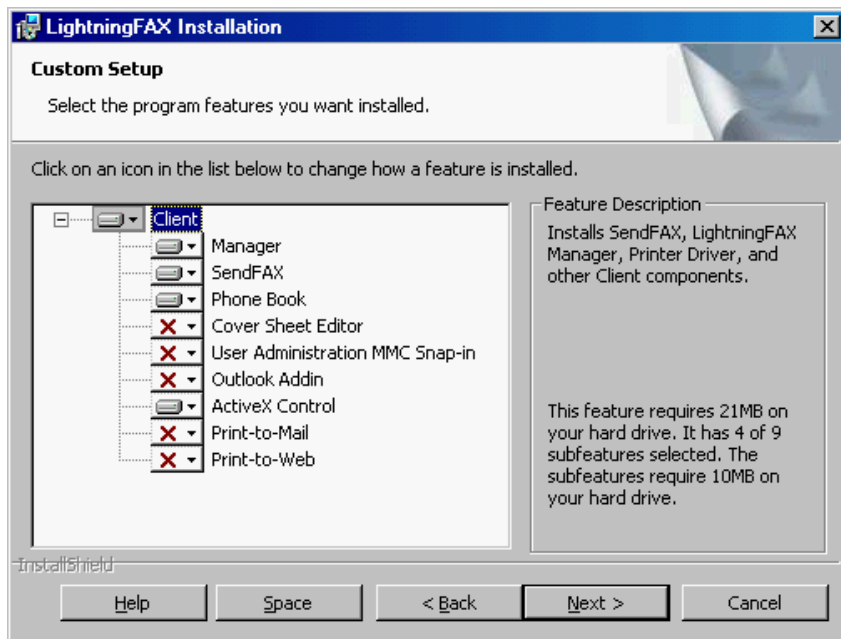


- 11 Choose the components that you need by clicking on them and selecting This feature, and all subfeatures, will be installed on local hard drive.

Deselect components only if you do not need to install them.

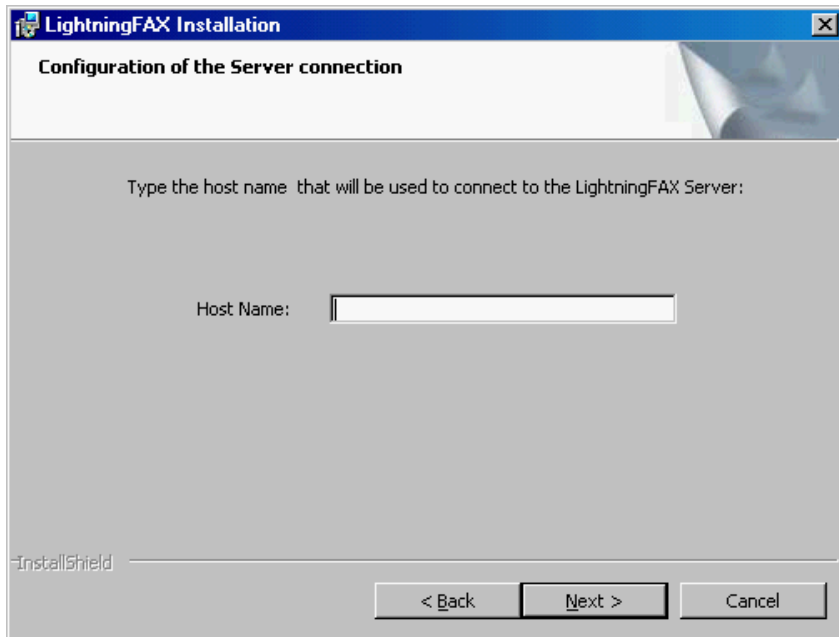
Some components may require extra configurations or the installation of third party software, as detailed in Installing third party software on page 79.

- 12 Click Next.



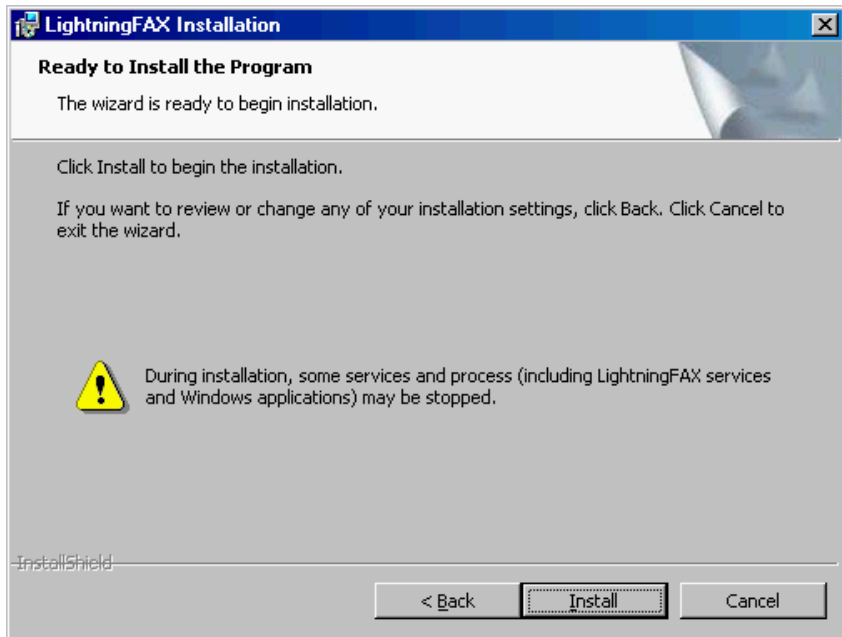
13 In the Host Name field, enter the name of the computer where the server components are hosted.

14 Click Next.

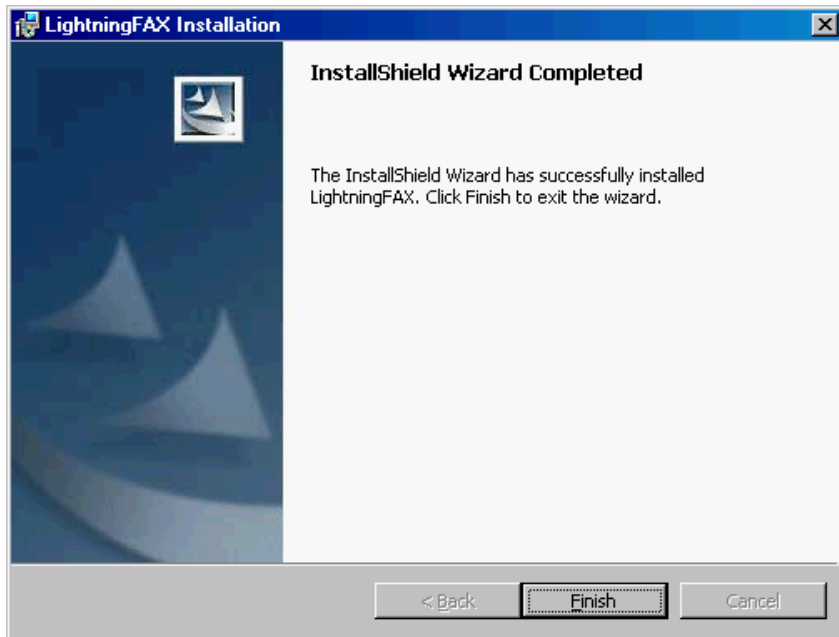


15 Click Install.

It will take a few minutes for the installation to complete. You can observe the progress, however, with the status bar that is displayed.



- 16 Click **Finish** when the installation is completed.



Configuring the gateways

The gateways for SMTP, Microsoft Exchange and SAP R/3 require special configurations, upon installation, as detailed in this section.

Gateway for SMTP

The installation procedure assumes that the following components have already been installed:

- The LightningFAX server and client;
- At least one rasterization server;
- The SMTP server and clients.

The `LFSMTP` service acts as a local SMTP server to accept messages to process, listening on TCP Port 25. Ensure that no other services are listening on port 25. Most Windows servers have the Microsoft "Simple Mail Transfer Protocol (SMTP)" service installed and running by default.

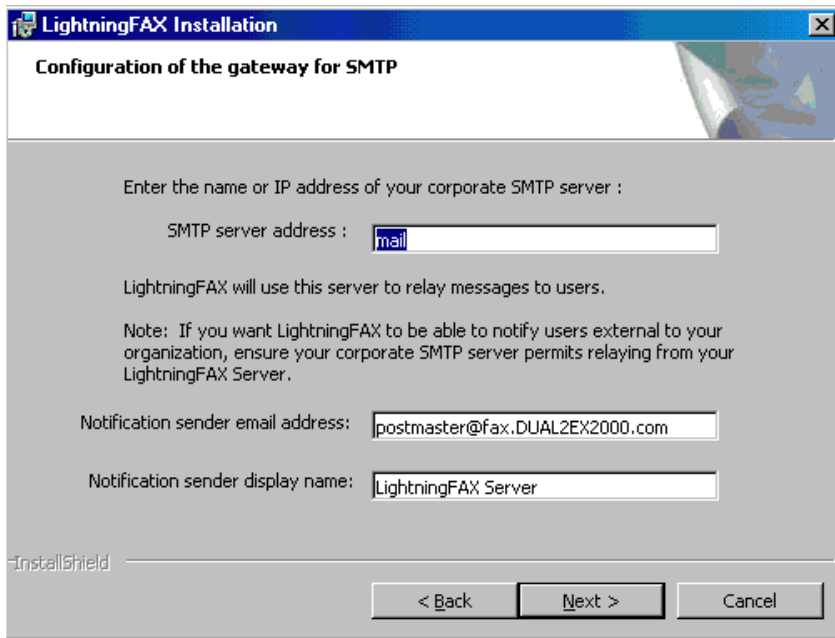
In order to allow the gateway for SMTP to function, you must disable this service. Please ensure that it is not being used for any other purposes before disabling it.

- 1 Enter the name or IP address of your corporate SMTP server.

LightningFAX will use this server to relay messages to users.

Note: If you want LightningFAX to be able to notify users external to your organization, ensure your corporate SMTP server allows relaying from your LightningFAX server.

- 2 Enter the notification sender's email address and display name in the appropriate fields.



The screenshot shows a Windows-style dialog box titled "LightningFAX Installation" with a sub-header "Configuration of the gateway for SMTP". The dialog contains the following text and fields:

- Text: "Enter the name or IP address of your corporate SMTP server :"
- Text: "SMTP server address :"
- Text input field: "mail"
- Text: "LightningFAX will use this server to relay messages to users."
- Text: "Note: If you want LightningFAX to be able to notify users external to your organization, ensure your corporate SMTP server permits relaying from your LightningFAX Server."
- Text: "Notification sender email address:"
- Text input field: "postmaster@fax.DUAL2EX2000.com"
- Text: "Notification sender display name:"
- Text input field: "LightningFAX Server"
- Text: "InstallShield" (small logo)
- Buttons: "< Back", "Next >", and "Cancel"

Gateway for Microsoft Exchange

The following components must be already installed in your LightningFAX network:

- The LightningFAX server and client;
- At least one rasterization server;
- The Microsoft Exchange server and Microsoft Outlook on the client workstations.

Note: The gateway for Microsoft Exchange must be installed on the same computer where the Microsoft Exchange server resides.

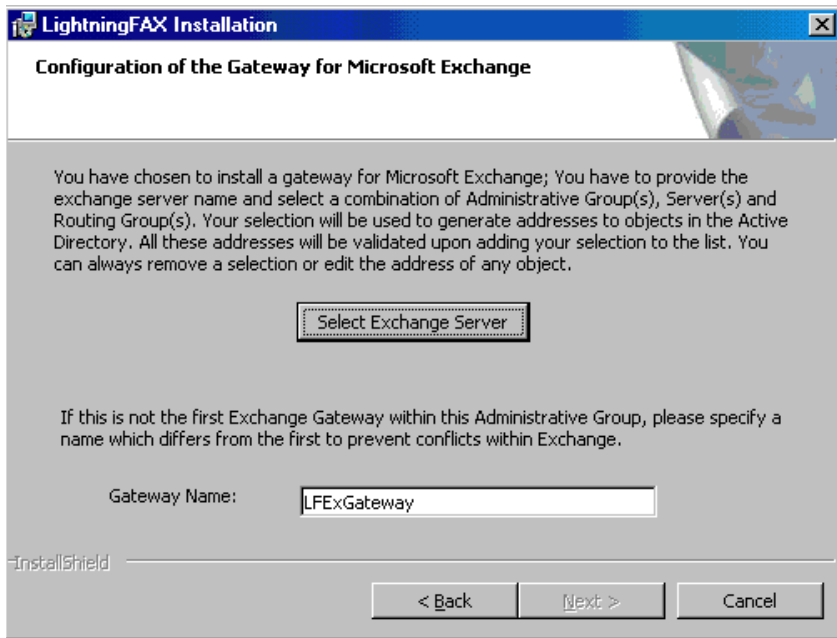
Users of Microsoft Exchange 5.5 Enterprise Edition must install Service Pack 4.

For users of Microsoft Exchange 2000 and 2003, the installation procedure offers extensions to the Microsoft Active Directory. Interstar recommends that you install them. If the Active Directory is installed, you are prompted to extend the schema to include LightningFAX properties such as an auto-routing, DID number, sending billing codes, Call Station ID, callback number, default profile and security options, etc...

If the Active Directory extensions are installed, fax operations using Outlook will query the Active Directory for the values of the properties. Otherwise they will query LightningFAX.

The installation procedure also provides the User Administration Microsoft Management Console (MMC) snap-in utility (not for Windows 95/98/ME), used to access and set these properties. This utility can be installed on any computer in the network and not necessarily on the same computer as the gateway.

- 1 Click the **Select Exchange Server** button to continue.



2 Enter the name or IP address of the closest Active Directory domain controller, and click Apply Server.

3 For more advanced Exchange environments, select the desired settings for Administrative Groups, Servers, Routing Groups, Storage Groups and Mailbox Store.

Note: If you are unsure of any values, please contact your Exchange administrator.

4 Click Select Configuration.

The screenshot shows the 'Exchange Gateway - Microsoft Exchange Gateway Configuration' dialog box. It has a blue title bar with a close button. The dialog is divided into two main sections: 'Active Directory Server Name' and 'Connector Configuration'.
In the 'Active Directory Server Name' section, there is a text box labeled 'Active Directory Server:' containing the text 'qalabdual2' and an 'Apply Server' button to its right.
The 'Connector Configuration' section contains several dropdown menus and a 'Select Configuration' button:

- 'Organization:' dropdown with 'CN=First Organization' selected.
- 'Administrative Groups:' dropdown with 'CN=First Administrative Group' selected.
- 'Servers:' dropdown with 'CN=QALABDUAL2' selected.
- 'Routing Groups:' dropdown with 'CN=First Routing Group' selected.
- 'Storage Groups:' dropdown with 'CN=First Storage Group' selected.
- 'Mailbox Store:' dropdown with 'CN=Mailbox Store (QALABDUAL2)' selected.

Below these sections is a large empty text box. To its right are 'View' and 'Remove' buttons. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

You should now see that a new configuration has been added.

- 5 Click OK.
- 6 Back in the Configuration of the Gateway for Microsoft Exchange dialog, specify a different name in the Gateway Name field, if this the second or more gateway for Microsoft Exchange in the Administrative Group.

This will prevent conflicts within Exchange.

The screenshot shows a dialog box titled "Exchange Gateway - Microsoft Exchange Gateway Configuration". It is divided into two main sections: "Active Directory Server Name" and "Connector Configuration".

Active Directory Server Name: This section contains a text input field labeled "Active Directory Server:" and an "Apply Server" button.

Connector Configuration: This section contains several fields and a button:

- "Organization:" with a text input field and a "Select Configuration" button.
- "Administrative Groups:" with a dropdown menu.
- "Servers:" with a dropdown menu.
- "Routing Groups:" with a dropdown menu.
- "Storage Groups:" with a dropdown menu.
- "Mailbox Store:" with a dropdown menu.

At the bottom of the dialog, there is a large text area containing the text "qalabdual2.DUAL2EX2000.com". To the right of this text area are "View" and "Remove" buttons. At the very bottom of the dialog are "OK" and "Cancel" buttons.

Extending the Active Directory schema

The Microsoft Active Directory is a database which contains, among other things, information about users, in the Windows domain. It basically serves to simplify system administration.

The Active Directory schema stores a description of each object's properties (such as a user).

Extending the schema means adding custom properties to existing user definitions, to accommodate directory-based applications in LightningFAX.

The following properties are added by LightningFAX:

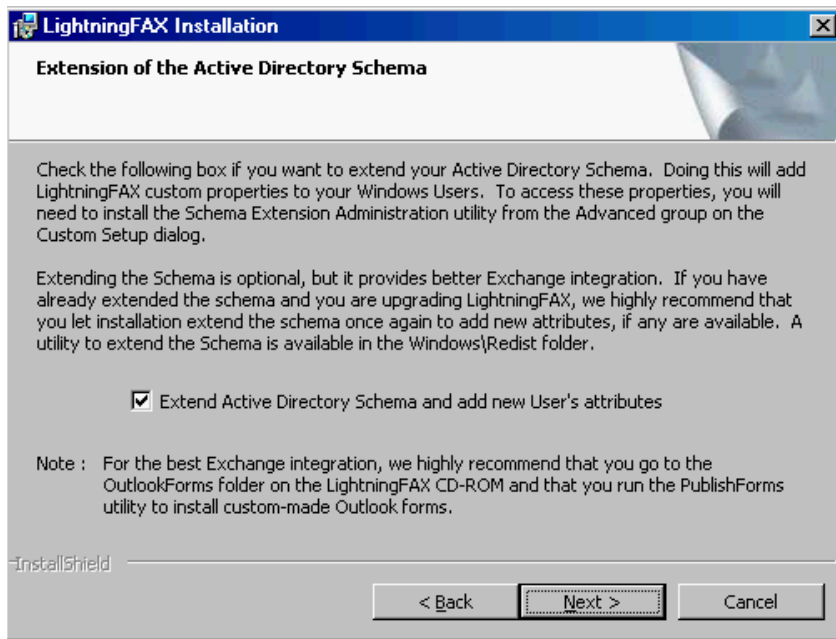
Auto-Routing	Billing Codes	Delivery Options	Security
DID	Sender billing code	CSID	Allow ability to send faxes
	Sender sub-billing code	Callback number	Allow ability to select profiles in fax message
		Fax prefix	Number restriction group
		Fax suffix	Must provide sender billing code
		Number of retries	Validate sender billing code
		Priority	Must provide recipient billing code
		Default resource	Validate recipient billing code
		Default profile	
		Use LCR	

- 1 If you want to extend your Active Directory Schema, ensure the box is checked.

This will allow you to manage your users from within the User administration MMC snap-in.

If you DO NOT want to extend your Active Directory Schema, ensure the box is not checked.

- 2 Click Next.



Gateway for R/3 (SAP)

The following components must already be installed, before installing the gateway for R/3:

- The LightningFAX server and client;
- At least one rasterization service;
- R/3.

Before installing the gateway for R/3, you must:

- create a Remote Function Call (RFC) destination in R/3;
- create a SAPconnect Node;
- create a CPIC user;
- activate the FAX function in SAPoffice.

You must then link every R/3 fax sender to a unique fax number.

R/3 pre-configuration

To create a Remote Function Call destination:

- 1 Launch R/3.
- 2 Choose Tools ➔ Administration.
- 3 Choose Administration ➔ Network ➔ RFC destination.
- 4 Press F8.
- 5 Enter the name of the destination. Interstar recommends LfsapGateway.
- 6 Select the T Connection Type then the TCP/IP protocol.
- 7 Press Enter.

You must link the RFC destination to SAPconnect by creating and customizing an SAPconnect node:

- 1 Launch R/3 if it is not already running.
- 2 Choose Tools ➔ Administration.
- 3 Choose Administration ➔ Process technology.
- 4 Choose Communication ➔ SAPconnect.
- 5 Choose View ➔ Node.
- 6 Press Ctrl + F5 to create the node.
- 7 Enter General Information.
- 8 Enter the name FAXnode in the Node field.
- 9 Enter a suitable description such as Used to send a fax through Lfsap.
- 10 Enter LfsapGateway in the RFC destination field.
- 11 Enter Node in use in the Mark flag field.
Not marking the flag as Node can cancel path reference.
- 12 Enter Supported address type for fax.

13 Press `Configure`.

14 Enter an asterisk (*) in the address area if you want this node to handle all faxes.

You can tailor entries to handle only certain faxes. For example, you might enter `US*` if you wanted this node to route only US faxes.

15 You must enter `PS` or `PDF`, or both, in the `Supported formats` field for R/3 internal use.

You can add other formats, for example: `doc`, `txt`, `raw` or `htm`, etc..., depending on the type of attachments your users might send. The rasterization server must be configured to support those formats. The rasterization server can be configured by choosing `Start` ➔ `Control Panel` ➔ `XMedius`.

16 Enter the appropriate initials in the `Country` field. For example: `CA`, `US`, `GB`.

17 Set `Dev.type:` to `POSTSPT`.

You must create a CPIC user who receives calls, that is, notification of incoming faxes, which are RFC calls in R/3. This user's password should never expire.

To create a CPIC user:

- 1 Launch R/3 if it is not already running.
- 2 Choose Tools ➔ Administration.
- 3 Choose User Maintenance ➔ Users.
- 4 Enter the user name. Interstar recommends using LfsapUser.
- 5 Choose User ➔ Change.
- 6 Enter the password and confirm it by entering it a second time.
- 7 Set the user type to CPIC.
- 8 Add the S-A.SCON Authorization profile.
- 9 Press F11 to save your entries.

To activate the FAX function in SAPoffice:

- 1 Launch R/3 if it is not already running.
- 2 Choose Tools ➔ Administration.
- 3 Choose Administration ➔ Process Technology.
- 4 Choose Office ➔ General office settings.
- 5 Switch on Fax components in Internal Administration: Connected components.

The SAPconnect module is in charge of sending and receiving the RFC calls used to connect R/3 to the LightningFAX Lfsap module. SAPconnect must be used for faxing.

To select SAPconnect for faxing:

- 1 Launch R/3 if it is not already running.
- 2 Choose Tools ➔ Administration.
- 3 Choose Administration ➔ Process technology.
- 4 Choose Communication ➔ SAPconnect.
- 5 Choose Goto ➔ Customizing.
- 6 Set type FAX to communication method SAPconnect.
- 7 Save your entries.

Each R/3 user who is to send faxes must have a unique fax number. This number is used as the User ID when RFC calls are sent. The number is used for notification routing and incoming faxes.

- 1 To assign a unique fax number:
- 2 Launch R/3 if it is not already running.
- 3 Choose Tools ➔ Administration ➔ Office user.
- 4 Choose Goto ➔ Address management.
- 5 Enter a default fax number under Communication.
- 6 Save your entries.

Configuring the gateway

- 1 If you elected to install the gateway for R/3, for more advanced environments, enter the desired settings in the appropriate fields.

Note: If you are unsure of any values, please contact your SAP administrator.

The screenshot shows a Windows-style dialog box titled "LightningFAX Installation" with a subtitle "Configuration of the R/3 Gateway". The dialog is divided into three main sections:

- Outgoing FAX Settings:** Contains three text input fields: "Destination:" with the value "FAX", "GWHOST:" with the value "/H/999.999.999/H/999.", and "GWSERV:" with the value "sapgw00".
- Incoming FAX Settings:** Contains three text input fields: "Destination:" with the value "MAT", "Client:" with the value "999", and "SYSNR:" with the value "1".
- CPIC User and Password for Incoming Faxes:** Contains two text input fields: "Account:" and "Password:", both currently empty.

At the bottom of the dialog, there is a status bar with the text "InstallShield" and three buttons: "< Back", "Next >", and "Cancel".

Configuring components

Some components require extra configurations or installation of third party software, as detailed in this section.

HP LanFax service

Before you install the network scanner service, you must install the Hewlett Packard Scanner Service itself. When you install the network scanner service, you are prompted to enter the full path to the current working directory for the Hewlett Packard Scanner Service. This path is specified when the Hewlett Packard Scanner Services is installed.

Note: The network scanner service should be installed on the same computer as the HP Scanner Service.

Follow Hewlett Packard's instructions for installing and configuring the HP 9100C Digital Sender service in your fax network.

- 1 In the Hewlett Packard JetAdmin Software, right-click on the scanner and select `Modify`.
- 2 Enter the internet host name of the computer where the HP 9100 C service is installed.
- 3 If DNS or WINS name resolution is not enabled, you must enter the IP number.
- 4 Select `Other Vendor without Notification` from the `Product Name` list.
- 5 Select the `Enable Fax` option to enable the service. When deselected, service is suspended but remains configured.

Advanced network scanner features

Use the table below to configure advanced features for network scanner service

Feature	Setting
Exchange File Format	G4 (The file format for sending fax data to the server.)
Resolution	Fine

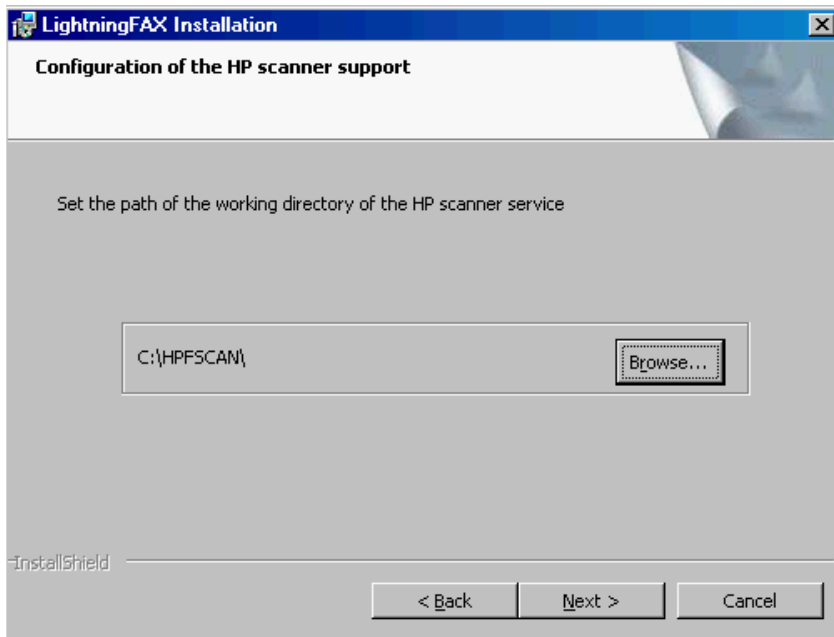
Accept the default settings for the following features:

Max. Trans. Speed	Maximum fax transmission speed
ECM	Error Correction Mode
Retry	Maximum number or times LightningFAX will re-dial after receiving a busy signal.
Interval	Number of minutes between retries
Default Accounting Code	Billing Code

Configuring the scanner service

- 1 If you elected to install the HP LanFax service, ensure that the path points to the location configured within the HP JetAdmin software for your HP devices. By default, it is C:\HPFScan.

Note: If you have not installed the HP scanner software yet, you can change this path later in the Control Panel applet for LightningFAX.



Web access

The following components must already be installed, before installing the web access:

- The LightningFAX server and client;
- The rasterization server;
- Microsoft Internet Information Server 5.0 or later.

Note: The web access must be installed on the same computer where the Microsoft IIS 5.0 or later resides.

Third-party software required by the web access include:

- Java 2 SDK v1.3.1_03;
- Jarkarta-Tomcat v3.2.2;
- JacORB v1.3;
- MySQL Server and Client v3.23.
- MySQL JDBC Driver v3.08;

You can choose not to install any of these programs if it is already installed on your system. However, you must execute the operations described in the LightningFAX Administrator Guide, to configure the installed packages.

You can install Jakarta-Tomcat, Java 2 SDK, JacORB and MySql JDBC Driver in any folder by changing the default folder.

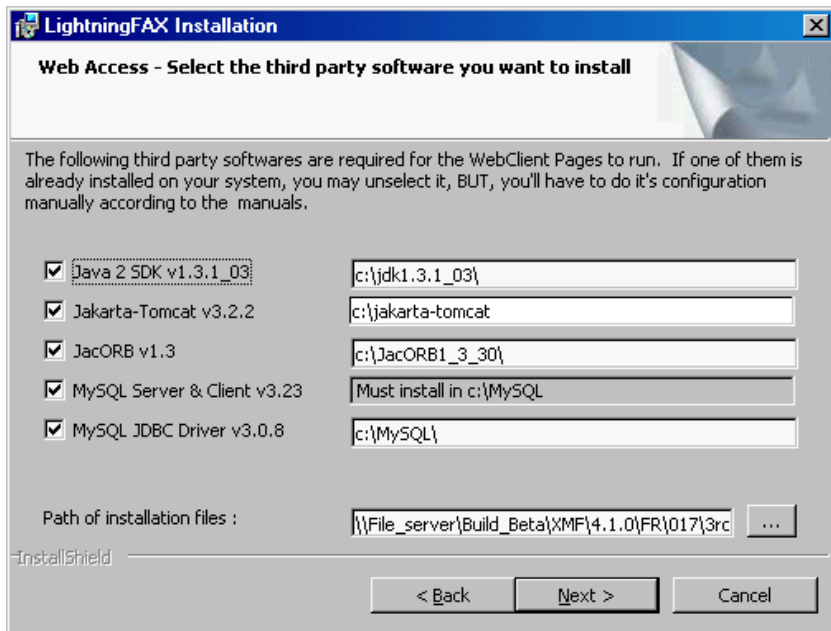
Note: The LightningFAX web pages too can be placed on another drive. However, if you place the web pages on a drive other than the default `c :` drive, you must modify the `server.xml` file as described in the LightningFAX Administrator Guide.

Installing third party software

- 1 Ensure that these components are installed, in order for the web access to function correctly.

If the components are already installed on your server, you can safely deselect them.

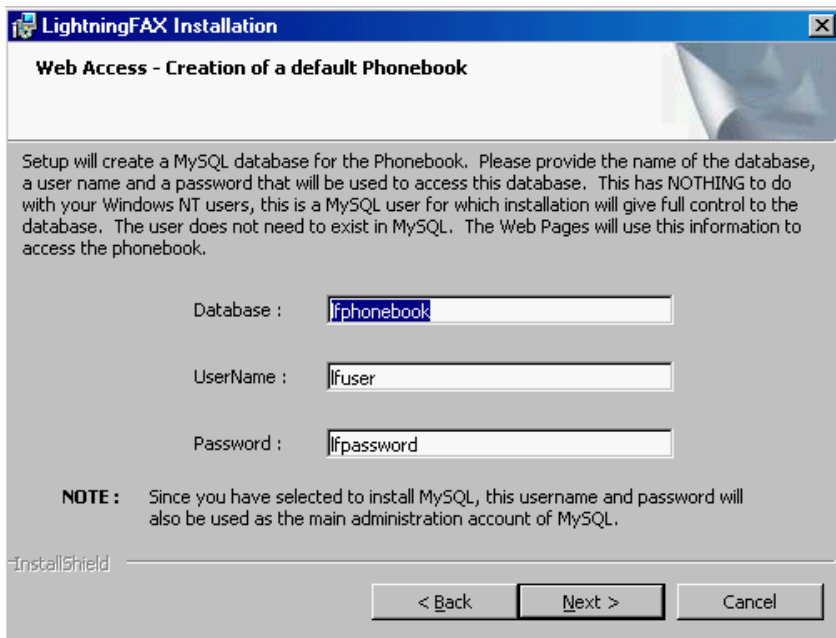
- 2 Click Next.



Creating a default phone book

If you elected to install the web pages, as part of the web access, the installation procedure creates a MySQL database for the default phone book.

- 1 If you prefer to change the default values, then as needed, enter a different name in the Database field, a MySQL user name in the UserName field and a corresponding Password.
- 2 Click Next.



LightningFAX Installation

Web Access - Creation of a default Phonebook

Setup will create a MySQL database for the Phonebook. Please provide the name of the database, a user name and a password that will be used to access this database. This has NOTHING to do with your Windows NT users, this is a MySQL user for which installation will give full control to the database. The user does not need to exist in MySQL. The Web Pages will use this information to access the phonebook.

Database :

UserName :

Password :

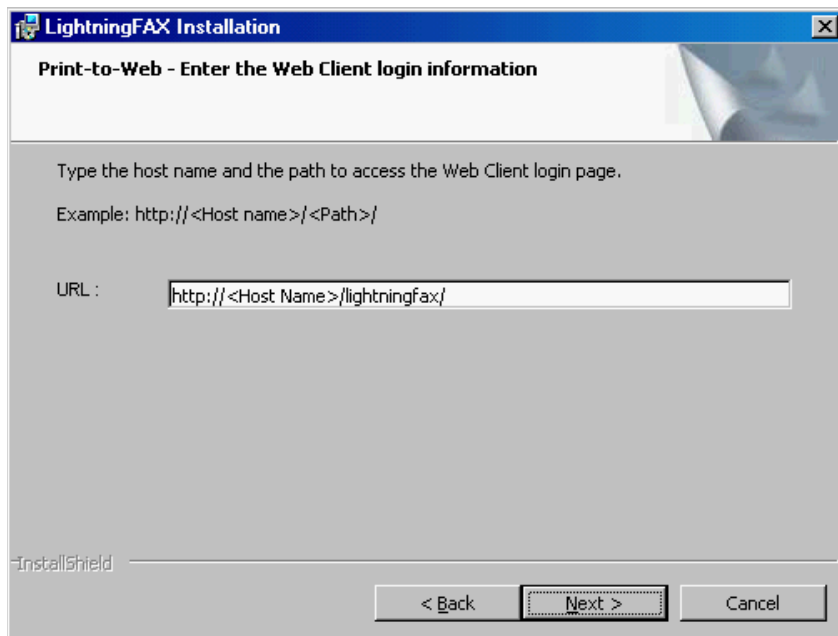
NOTE : Since you have selected to install MySQL, this username and password will also be used as the main administration account of MySQL.

InstallShield

< Back Next > Cancel

Print-to-Web printer driver settings

- 1 In the URL field, enter the path, including the host name or IP address of the computer where the web access is installed.



Publishing the forms for Microsoft Outlook

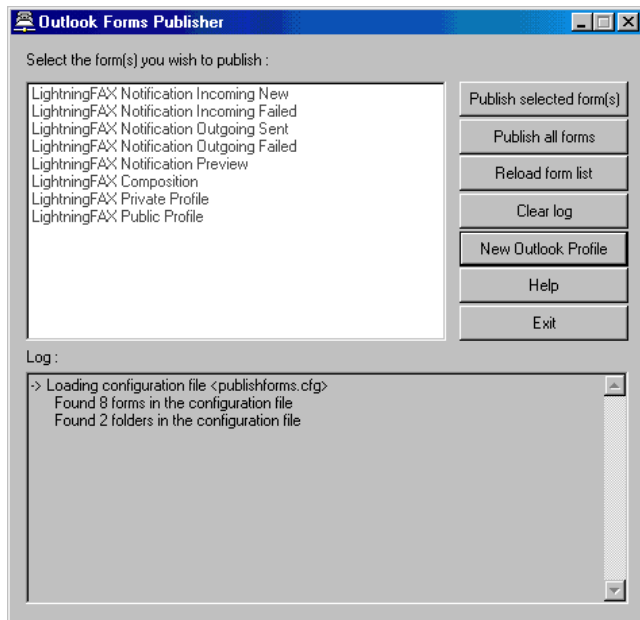
This procedure requires that Microsoft Exchange and Outlook 98 or later be already installed, on separate computers.

The gateway for Microsoft Exchange and the Rasterization service must also be installed on the network.

Note: Outlook 2003 must not be set in "Cached Exchange Mode" or offline mode when publishing the forms.

You must also be logged into an Outlook MAPI session, using an account with sufficient privileges to manage the Public Message Store.

You only need to publish the forms once, to make them available to all Outlook users.



The profile forms require some public folders to be created; the procedure will create them and publish the cover sheets in them.

This installation procedure automatically creates the `Organizational Forms Library`. The dialog offers a `Help` button that you may wish to consult before starting the installation.

- 1 Insert the `LightningFAX` CD and navigate to the `\OutlookForms` folder.
- 2 Double-click `publishforms.exe`.
- 3 When you start the publishing process, you are prompted to select one of your available Exchange configurations. This profile is used to create required folders and set appropriate rights. If you are prompted again with the same dialog, please choose the same profile as before.

Note: If Outlook is running, you will be prompted to confirm the use of the current profile. Click `OK`.

- 4 Click `Publish all Forms` or select only those forms that you wish to install and click `Publish selected form(s)`.

Note: The form named `LightningFAX Composition` emails a preview to the user's inbox. Also, the installation of the forms may prompt you to enable or disable macros. Always click the `Disable Macros` button.

Use the `Reload form list` button to refresh the list of publishable forms.

Use the `Clear log` button to clear the contents of the bottom panel.

- 5 Forms are published in the Organizational Forms Library that matches the Microsoft Outlook profile's locale. To publish forms in a foreign language, you need an Outlook profile whose locale matches that language. Use the New Outlook Profile button to create a new profile in the desired language.
- 6 When the installation of the forms is completed, Done will appear in the bottom panel. Click Exit.

Note: An incompatibility between Microsoft Windows 2000 or 2003 Terminal Server and Outlook XP, 2000 or 2003, prevents scripts of any kind from working properly, thus affecting the forms for Microsoft Outlook.

A workaround exists, as posted by Microsoft at the location:

<http://support.microsoft.com/default.aspx?scid=kb;en-us;Q302003>

which instruct you to:

- 1 Copy the Outlvbs.dll file from a computer running Microsoft Windows 2000 or 2003 that is not a Terminal Server.
- 2 Paste the Outlvbs.dll file in the Program Files\Microsoft Office\Office10 folder of the affected Terminal Server computer.

Note: The PDF viewing component in Adobe Acrobat Reader 7 is only compatible with Microsoft Outlook 2003 or Microsoft Outlook XP with Service Pack 3. If you are going to view notifications in PDF format, it is recommended that you install one of these versions of Outlook. Using it with any older version may cause the latter to crash unexpectedly.

Installing the forms for Lotus Notes

A form is a visual tool to collect and display data. There are two ways to install the forms for Lotus Notes database, automatically or manually. The database must first be signed by an administrator, to vouch for its integrity.

Note: The administrator installing the forms must have the proper authorizations to install new databases, access the Lotus Notes client Administrator and modify access control lists. It must also be authorized to modify configuration documents on the server.

Signing the database

- 1 In Microsoft Windows Explorer, browse to the `\Lotus\Domino\Data` directory, on the server hard drive.
- 2 Create a sub-directory called `Fax`.
- 3 Copy the `Fax_Memo_Install.nsf` and `FAXconfiguration.nsf` database files, from the `\NotesForms` folder on the LightningFAX CD to the `Fax` sub-directory you just created.

Note: `.nsf` stands for **Notes Storage Facility**. These files represent typical Lotus Notes databases.

- 4 Start the Domino Administrator by clicking `Start` ➔ `Programs` ➔ `Lotus Applications` ➔ `Lotus Domino Administrator`.

- 5 Once logged in, click on the tab for the server (domain), on which the database that you want to sign is located.
- 6 Click on the `Files` tab.
- 7 In the panel at the left, double-click on the `Fax` folder.
- 8 In the panel at the center of the window, select both databases (Fax Memo Install and Fax Configuration), right-click and select `Sign`.
- 9 Choose either of the following, as per your organization's policy:
 - Active User's ID to sign using your ID.
 - Active Server's ID to sign using the ID of the server that stores the database or template.
- 10 Click `OK`.
- 11 In the `Create Cross Certificate` dialog that appears, click `Yes`.

A dialog box may appear, showing the number of databases processed and the number of errors that occurred (if any). See the `Notes Log` for details.

Automated procedure

The automated procedure is designed for administrators who are not very familiar with the client Notes Designer. The goal is to modify as little as possible the organization's mail template, whether it is standard or customized for a client's specific needs.

- 1 Start Lotus Notes by clicking `Start` ➔ `Programs` ➔ `Lotus Applications` ➔ `Lotus Notes`.
- 2 Select the tab for an empty workspace and click `File` ➔ `Database` ➔ `Open` or right-click in the workspace and select `Open Database`.
- 3 In the `Open Database` dialog that appears, select the server where the `Fax_Memo_Install.nsf` and `FAXconfiguration.nsf` database files are located, in the `Server` box.
- 4 Double-click on the `Fax` folder and then double-click on `Fax Memo Install`.
- 5 Click `Open`. The `Installation Form` tab is created in the Lotus Notes workspace (see snapshot on next page).

Installation Program

Step : 0 of 4

Status : Installation Not Started

Installation Path : C:\Lotus\Domino\Data

Mail Template Path : C:\Lotus\Domino\Data

Mail Template Name : mail6.ntf

Server Name : CN=qalab43/O=Interstar

Begin Installation

Press on the Begin Installation Button

6 Fill in the fields as follows:

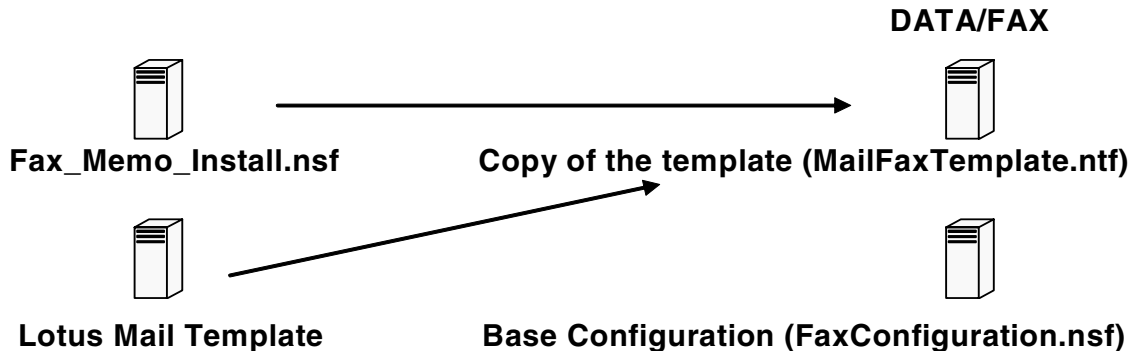
- | | |
|---|---|
| <input type="checkbox"/> Installation Path | The location on the server where Lotus Notes is installed (should be C:\Lotus\Domino\Data); |
| <input type="checkbox"/> Mail Template Path | The path where the organization mail template is located (should be C:\Lotus\Domino\Data); |
| <input type="checkbox"/> Mail Template Name | The name of the organization's current mail template file; |
| <input type="checkbox"/> Server Name | The name of the server where Lotus Notes is installed. |

7 Click the **Begin Installation** button. A progress bar shows you the evolution of the installation.

The installation database (`Fax_Memo_Install.nsf`) contains all the design elements necessary to install the fax forms. The configuration database (`FAXconfiguration.nsf`) is used to define the various languages.

The automated installation basically does the following (as represented in the figure on the next page):

- Copy the organization's current mail template into the Fax sub-directory (`MailFaxTemplate.ntf`);
- Integrates the fax form design elements into the copy of the mail template;
- Configures the database.




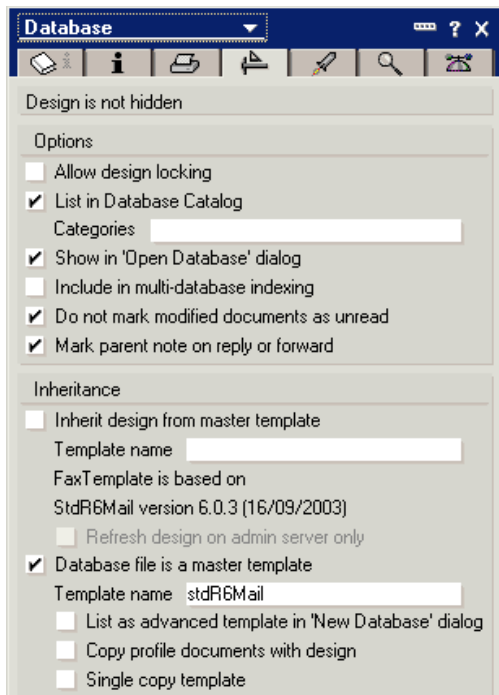
The copy of the mail template becomes the new template that will be used to refresh the user's mail databases.

- 8 Once the automated installation procedure is complete, click the `Exit Installation` button that appears.
- 9 You are prompted to open the configuration database to setup your specific language needs. Click `Yes` to proceed with the setup, or click `No` and skip to step 11 (if you want to do this at a later time).

- 10 If you clicked **Yes**, a **Fax Configuration** tab opens in the workspace. Follow the procedures in **Configuring the forms** on page 102, to configure the language text in the form, add cover sheets or change the fax domain.
- 11 Click **File** ➔ **Database** ➔ **Open** or right-click in the workspace and select **Open Database**.
- 12 In the **Open Database** dialog that appears, select the Lotus Notes server, in the **Server** box.
- 13 In the **Filename** field at the bottom, type the name of the organization's current mail template file (**.ntf**).

Note: **.ntf** stands for **Notes Template Facility**. Such a file represents a Lotus Notes template, a skeleton that contains database design elements, but no documents.
- 14 Click **Open**. A new tab appears showing the organization's **Inbox**.


- 15 Click File ➔ Database ➔ Properties.
- 16 In the dialog that appears, click the fourth tab ().
- 17 Highlight the value in the Template name field, right-click and select Copy.
- 18 Uncheck the Database file is a master template box.
- 19 Close the dialog.
- 20 Click File ➔ Database ➔ Open again or right-click in the workspace and select Open Database.
- 21 In the Open Database dialog that appears, select the Lotus Notes server, in the Server box.
- 22 Double-click on the Fax folder.
- 23 In the Filename field at the bottom, type Fax\MailFaxTemplate.ntf.



24 Click Open. The Mail-Fax Template - Fax tab opens and a Fax option is now visible in the Views folder in the left pane. A Mail-Fax Template icon is also created in the workspace.

Note: Views display specific documents with similar criteria in a database.

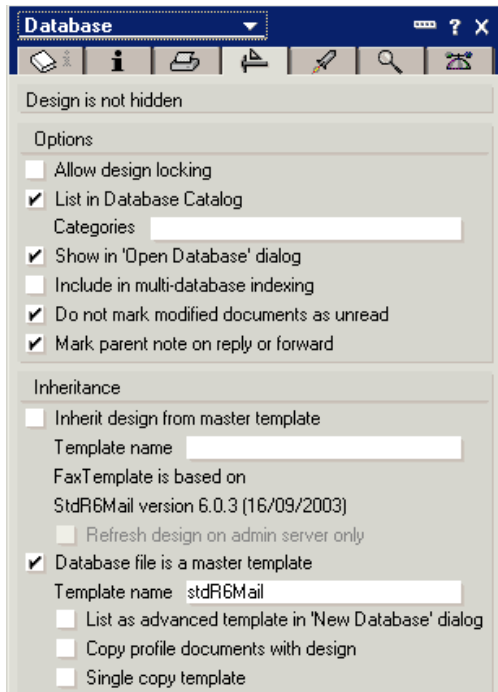
25 Click File ➔ Database ➔ Properties.

26 In the dialog that appears, click the fourth tab () (see snapshot on next page).

27 Check the Database file is a master template box.

28 Right-click and select Paste, in the Template name field. The name of the organization's current mail template should now appear.

29 Close the dialog.



Synchronizing the mail template databases immediately

The Designer server task automatically synchronizes all server and user databases that are linked to a template. This server task runs by default at 1:00 AM. For the update to work, a template must reside on the same server as the databases linked to it. Replicas synchronize with the templates stored on their servers.

However, if an administrator wants to do the synchronization of the mail template databases immediately, he (she) must execute the following procedure:

- 1 Start the Domino Administrator by clicking Start ➔ Programs ➔ Lotus Applications ➔ Lotus Domino Administrator.
- 2 Once logged in, click on the tab for the server (domain), on which the database that you want to synchronize is located.
- 3 Click on the Server, then the Status tabs.
- 4 Click Server Console in the panel at the left.
- 5 Type `Load design -f Fax\MailFaxTemplate.ntf` in the Domino Command box at the bottom of the console, and then press Enter.

Manual procedure

To use the manual procedure, the administrator should be familiar with the client Notes Designer.

Note: The databases must be signed, as shown in Signing the database on page 85.

- 1 Copy the organization's current mail template into the `\Lotus\Domino\Data\Fax` directory, calling it `MailFaxTemplate.ntf`.
- 2 Start the Lotus Notes client Designer by clicking `Start` ➔ `Programs` ➔ `Lotus Applications` ➔ `Lotus Domino Designer`.
- 3 Click on `Open an existing database`.
- 4 In the `Open Database` dialog that appears, select the Lotus Notes server, in the `Server` box.
- 5 Double-click on the `Fax` folder.
- 6 Double-click on `Mail-Fax Template`. A tab opens, showing the contents of the database.
- 7 Click again on `Open an existing database`.
- 8 In the `Open Database` dialog that appears, select the Lotus Notes server, in the `Server` box.
- 9 Double-click on the `Fax` folder.
- 10 Double-click on `Fax Memo Install`. Another tab opens, showing the contents of the database.

- 11 In the window for this tab, right-click the FaxForm entry and select Copy.
- 12 Click on the Mail-Fax Template - Conception tab, right-click anywhere in the window and select Paste.


The design elements copied from one database to the other are:

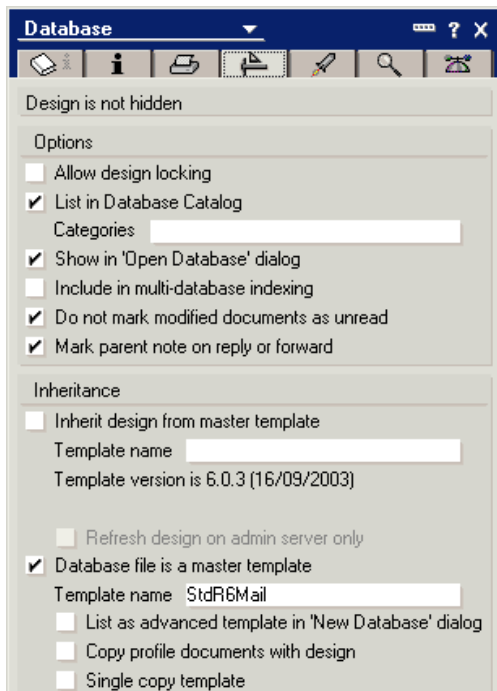
Form	Fax Fax Memo
View	Fax
Sub-form	SFRM010 SFRM020
Agents	AG010 AG020


Note: Sub-forms are a shared design resource that can be inserted into forms by formula or permanently. Sub-forms are just like forms and usually contain a set of common fields or actions that can be reused in other forms.

The copy of the mail template becomes the new template that will be used to refresh the user's mail databases.

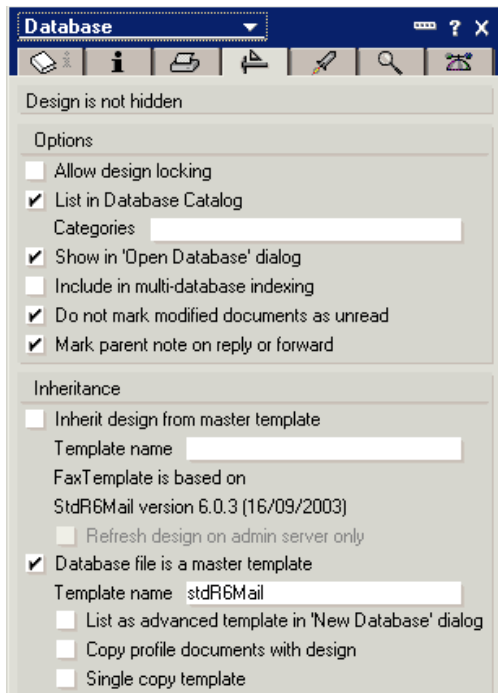
- 13 If needed, follow the procedures in *Configuring the forms* on page 102, to configure the language text in the form, add cover sheets or change the fax domain.
- 14 Once the automated installation procedure is complete, click **File** ➔ **Database** ➔ **Open** or right-click in the workspace and select **Open Database**.
- 15 In the **Open Database** dialog that appears, select the Lotus Notes server, in the **Server** box.
- 16 In the **Filename** field at the bottom, type the name of the organization's current mail template file (.ntf).
- 17 Click **Open**. A new tab appears showing the organization's **Inbox**.

- 18 Click **File** ➔ **Database** ➔ **Properties**.
- 19 In the dialog that appears, click the fourth tab ().
- 20 Highlight the value in the **Template name** field, right-click and select **Copy**.
- 21 Uncheck the **Database file is a master template** box.
- 22 Close the dialog.
- 23 Click **File** ➔ **Database** ➔ **Open again** or right-click in the workspace and select **Open Database**.
- 24 In the **Open Database** dialog that appears, select the **Lotus Notes** server, in the **Server** box.
- 25 Double-click on the **Fax** folder.
- 26 In the **Filename** field at the bottom, type `Fax\MailFaxTemplate.ntf`.
- 27 Click **Open**. The **Mail-Fax Template - Fax** tab opens and a **Fax** option is now visible in the **Views** folder in the left pane. A **Mail-Fax Template** icon is also created in the workspace.



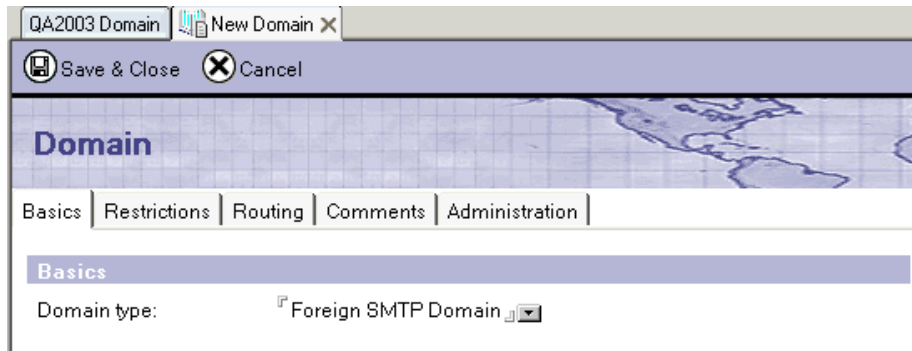
- 28 Click File ➔ Database ➔ Properties.
- 29 In the dialog that appears, click the fourth tab ().
- 30 Check the Database file is a master template box.
- 31 Right-click and select Paste, in the Template name field. The name of the organization's current mail template should now appear.
- 32 Close the dialog.

Note: If you wish to synchronize the mail template database for all servers and users, follow the procedure described in Synchronizing the mail template databases immediately on page 94.



Re-directing the fax domain towards the gateway for SMTP

- 1 Start the Domino Administrator by clicking Start ➔ Programs ➔ Lotus Applications ➔ Lotus Domino Administrator.
- 2 Once logged in, click on the tab for the server (domain).
- 3 Click the Configuration tab.
- 4 Expand the Messaging item in the left-hand panel and click on Domains.
- 5 Click Add Domain.



- 6 Under the Basics tab, select Foreign SMTP Domain in the Domain type field.
- 7 Under the Routing tab, type Fax.com in the Internet domain field.
- 8 Type Gateway in the Domain name field.
- 9 Click Save & Close. A new entry called Fax.com should be visible in the central panel of the Administrator.
- 10 Close the Notes client Administrator.

The screenshot shows the 'Domain' configuration window in the Notes client Administrator. The window title bar includes 'QA2003 Domain' and 'New Domain X'. Below the title bar are 'Save & Close' and 'Cancel' buttons. The main area has a 'Domain' header and a background image of a world map. There are five tabs: 'Basics', 'Restrictions', 'Routing', 'Comments', and 'Administration'. The 'Basics' tab is selected. It contains two main sections: 'Messages Addressed to:' and 'Should be Routed to:'. The 'Messages Addressed to:' section has an 'Internet Domain:' label and a text field containing 'Fax.com'. The 'Should be Routed to:' section has a 'Domain name:' label and a text field containing 'Gateway', followed by 'or,' and an 'Internet host' label with an empty text field.

Configuring the forms

Modifying the language text

To change the descriptor of any field, for a chosen language configuration (if you are performing this procedure as part of the automated installation, start at step 6):

- 1 Start Lotus Notes by clicking **Start** ➔ **Programs** ➔ **Lotus Applications** ➔ **Lotus Notes**.
- 2 Select the tab for an empty workspace and click **File** ➔ **Database** ➔ **Open** or right-click in the workspace and select **Open Database**.
- 3 In the **Open Database** dialog that appears, select the server where the `FAXconfiguration.nsf` database files is located, in the **Server** box.
- 4 Double-click on the **Fax** folder and then double-click on **Fax Configuration**.
- 5 Click **Open**. The **Fax Configuration** tab is created in the Lotus Notes workspace.

The screenshot shows the Lotus Notes interface with the 'Fax Configuration' tab active. The 'System Configuration' section is expanded, showing a table of configurations for different languages. The table has four columns: Language, Fax Domain, Cover Sheet, and Salutation. The rows represent EN, FR-CA, and FR configurations.

Language	Fax Domain	Cover Sheet	Salutation
EN	@Fax.com	<None>;Basic01;Basic02;BasicBlock;BlockShaded;BusinessRe	Mr.;Miss.;Madam;Mister
FR-CA	@Fax.com	<Aucune>;Affaire.01;Affaire.02;AlignementGauche;Base01;Basi	M.;Mme.;Madame;Monsieur
FR	@Fax.com	<Aucune>;Affaire.01;Affaire.02;AlignementGauche;Base01;Basi	M.;Mme.;Madame;Monsieur

- 6 Double-click on the language in which you want to make the modification (and click the `Edit` button in the dialog), or click once on it and click `Edit`.
- 7 Browse to find the element that you want to change, click or double-click on it and type in the new value.

Note: In the case of the Multilingual Keywords, do not modify the part at the left of the ":"; only the right-hand part needs to be changed.

- 8 Click the `Save & Close` button, to save your changes.

Click `Close` to exit, if you did not make any modifications. If you did, answer `Yes` to save them, or `No`, to exit without saving.

Adding a cover sheet

- 1 Execute steps 1 to 5, as shown in the previous section (unless you are performing this procedure as part of the automated installation).
- 2 Double-click on the language in which you want to make the modification (and click `Edit` in the dialog), or click once on it and click `Edit`.
- 3 Go to the `Cover Sheet` section and position yourself at the end of the last cover sheet in the list (make sure you are in edit mode).
- 4 Press `Enter` to add a new line.

- 5 Type the name of the new cover sheet, without the extension.

Note: The cover sheet file (.cse) must exist in the \LightningFAX\LFserver\cover directory on the server.

- 6 Click the `Save & Close` button, to save your changes.

Click `Close` to exit, if you did not make any modifications. If you did, answer `Yes` to save them, or `No`, to exit without saving.

Changing the fax domain

- 1 Execute steps 1 to 5, as shown in the previous section (unless you are performing this procedure as part of the automated installation).
- 2 Go to the `Fax Domain` section, click or double-click on the value and type in the new domain.
- 3 Repeat for all the languages being used.
- 4 Click the `Save & Close` button, to save your changes.

Click `Close` to exit, if you did not make any modifications. If you did, answer `Yes` to save them, or `No`, to exit without saving.

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