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# FaxWare®

## **e-Messaging Server Installation and Configuration Guide**

Windows NT/2000



**THE NETWORK FAX SPECIALISTS**

## RECOMMENDATIONS and IMPORTANT NOTES

FaxWare e-Messaging Server is a bundled package that includes Tobit's FaxWare 6, a Multi-Tech Systems "Multi Modem", and Tobit's ActivFax faxing add-on for Outlook/Office2000. Setting up FaxWare e-Messaging Server is now easier than ever, with these step-by-step instructions, configuration flowcharts, and customized Port Setup program! E-Messaging Server can be run under WindowsNT 4.0 or Windows 2000 Server. It MUST be installed on a PDC (Primary Domain Controller) or BDC (Backup Domain Controller) machine in the domain, NOT a member server!

### Before installing e-Messaging Server

- Ensure you're using the latest Microsoft Service Pack for NT/2000.
- Ensure your WindowsNT/2000 Server is formatted in the NTFS file system.
- Ensure you have configured your modem port in WindowsNT.

### System Requirements

**Server Memory:** At least 12MB more memory than recommended as standard by Microsoft. For each additional communication port (Transport Layer Driver) that has been installed, you should allow about 500 KB of memory. We recommend *at least* 64MB memory for a stand-alone FaxWare e-Messaging Server - more if you have any other applications running on this same machine.

**Server Hard Drive:** At least 100 MB of free space on the partition e-Messaging Server will be installed to. If your fax traffic is very high, you should allow for more free space. On the average, you should allow 100 KB per fax page.

### Choose Your Preferred Installation

After steps 1 through 5, choose the appropriate path to completing your installation according to your established email system:

- Outlook 2000 TX** If you will be using ActivFax to send faxes ONLY (ie. your FaxWare system and modem are set up to only send and NOT receive), skip Step 6 and proceed to Step 7.1. Once Step 7.1 is completed, you're done!
- Outlook 2000 RX/TX** If you will be using ActivFax to send and receive faxes, follow Steps 6 and 7.1. Once Step 7.1 is completed, you're done!
- Other Email Clients** Follow Steps 6 and 7.2 only. Once Step 7.2 is completed, you're done!
- Tobit InfoCenter client** After Step 5, stop and simply install the Tobit InfoCenter client via the \DAVID\CLIENTS\SETUP.EXE file, for each end-user. You're done!

# INSTALLATION AND CONFIGURATION CHECKLIST

Follow this checklist to ensure you have finished all the required steps before proceeding to the next one. Should you have trouble during your installation and call Tobit Technical Support, we will need to know what step in the checklist you are having trouble with and what you have done up until that point. So we can resolve your problem efficiently, please have your checklist and documentation handy when calling us for support.

## Checklist

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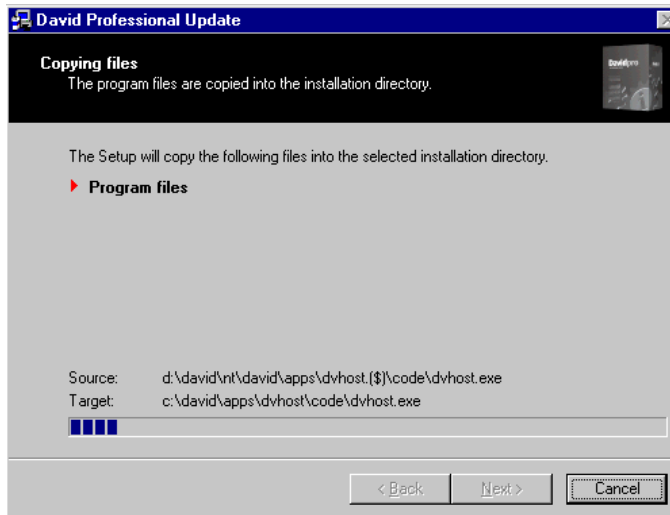
Once all 7 steps have been completed, you're done! Congratulations, and enjoy your new FaxWare e-Messaging Server system! Don't forget to check the end of this document for our technical support policy and contact information.

# Step 1 - Server Installation

The WindowsNT/2000 Server that e-Messaging Server will be installed on must be equipped with a CD-ROM drive.

**PLEASE NOTE:** If you will be using ActivFax to send faxes only (ie. the Outlook 2000 TX option on page 2), or the Tobit Infocenter client, you do not need to install an SMTP (postman) port!

- Ensure you are logged in as Administrator. This is important since the installation will create/start some system services and requires sufficient rights to do so. Also ensure the Administrator account has the "Logon as Service" access right!
- Insert the FaxWare e-Messaging Server CD. If you have Auto-Insert Notification enabled, the setup program will begin automatically. Otherwise, run `SETUP.EXE` from the root directory of the CD.
- Select your preferred language for the installation.
- Enter the license number provided on your licensee card.
- Accept the default installation path - do not change this unless absolutely necessary! We always recommend the product be installed to the default path.
- The files will then be copied to your server - this may take a few minutes.



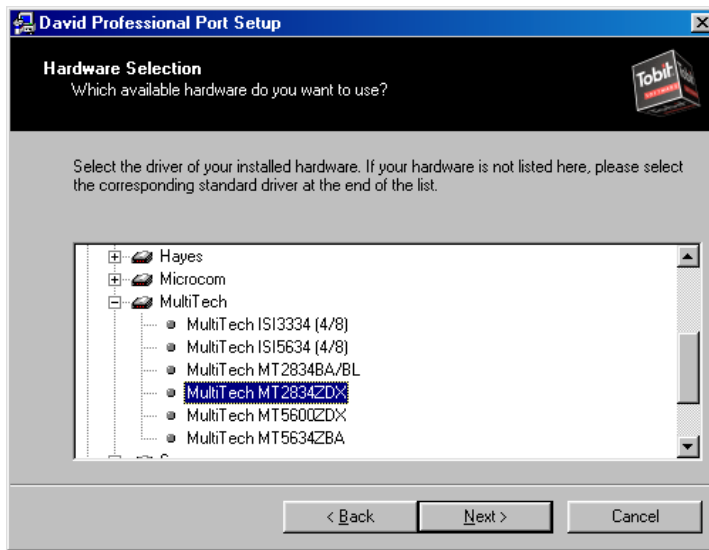
## Step 2 - Setting Up the Modem Ports

The "Port Setup Utility" is used to install and configure the ports. Each fax line is a separate port; each PostMan (SMTP) port is also a port. To receive and send faxes with your preferred email client, you will also need to set up one "PostMan" port. (Setting up PostMan is explained in detail in the "Email Integration" section of this guide.) **Please ensure you have the required number of port licenses!**

**For example:** You have two modems. You also want to use Email Integration. Therefore, you will require 3 port licenses - one for PostMan, and two for the modems.

Once the file copy portion of the installation is complete (as in Step 1 above), the Port Setup program should start automatically. If it does not, simply run "Port Setup" from the Start menu, under the Programs / David IIE program group.

- Select the first option, "Fax/Voice/TMail". Do **not** select "Auto Hardware Detection"! At the next screen, expand the trees until you see the following:



- Select the appropriate Multi-Tech modem that came with your e-Messaging Server bundle.
- Enter the port description (eg. Port 1 Outgoing) and CSID for this line.
- Choose "Selection at Server" for the next option.
- Enter the required information at the next screen and select "Finish" to complete the port setup. To set up additional ports, click on "Add Port" and follow the same previous steps for each additional port.

## Step 3 - Setting up the PostMan Port

While still in the Port Setup utility, click on "Add Port" when you finish setting up your last modem port (or simply run the Port Setup utility again).

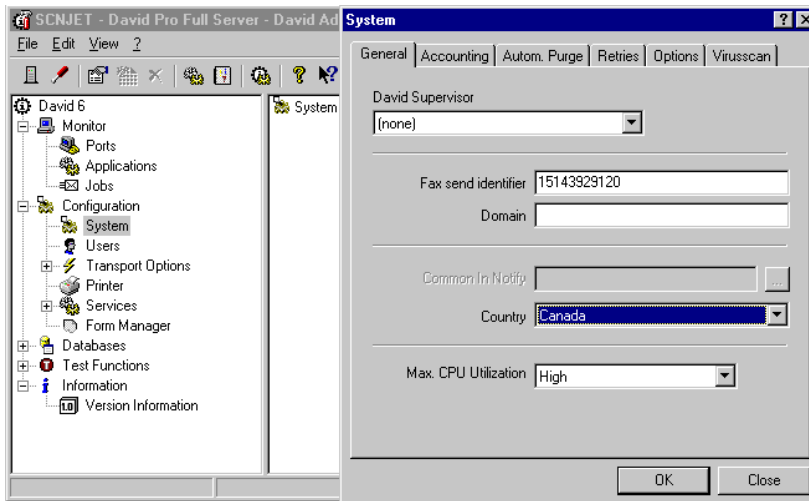
- Select "Email" as the port type and then "David PostMan" as the service.
- Follow the prompts and read the on-screen information carefully.
- At the following screen, enter the domain name you have configured in your DNS for FaxWare e-Messaging Server. It is not required, however, to make an entry in your DNS for it - if you choose not to do so, please leave this field blank and PostMan will pick up the server's IP address automatically.



## Step 4 - Configuring the System

On the server, start the David Administrator (Programs / David IIE / David Admin). Select Configuration / System from the main menu (left-hand side of the screen).

- Enter your main CSID in "General Fax send identifier".
- Set "Maximum CPU Utilization" to "High".
- **DO NOT** enter any data in the **DOMAIN** field! (It would conflict with the settings we will configure later for email integration.)

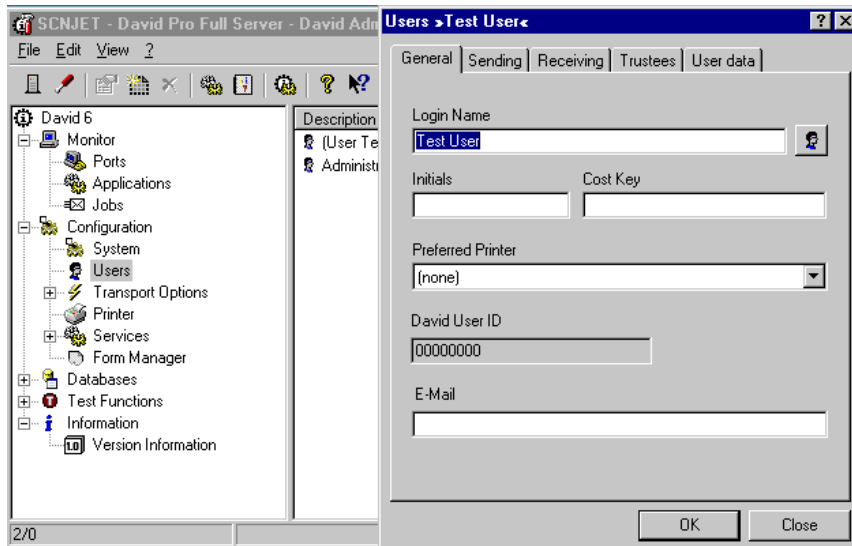


- Other options in this Configuration menu can be changed according to your preferences - reference the online Help at any time by pressing [F1], on any Tobit screen.
- Stop and restart the Service Layer Service (via the "Services" button in David Admin) whenever you make configuration changes to the system.

## Step 5 - Adding and Configuring Users

Each user who will be sending or receiving faxes must be configured in the David Administrator. Please ensure you have sufficient user licenses for the number of users who will be faxing!

- In the David Admin, select Configuration / Users.
- Press **[Ins]** to add a user. A listing of all system users will appear; select the user you wish to add. Please note a user cannot be created in David Admin if there is no corresponding domain/server account!
- Enter the required information (press [F1] at any screen for an explanation of the fields).
- Under the "User Data" option, **DO NOT ENTER** any data in the **EMAIL ADDRESS** field! (Again, this would conflict with the settings we will configure later for email integration.)



- Click 'OK' to save the changes. Add all other users as per the above procedure.



## Step 6 - Configuring Email Integration

Now that the modem is set up, the crucial system settings have been configured and the users have been added, it's time to configure FaxWare e-Messaging Server to work with your existing email system and client software. The MailGate/PostMan modules are the "Fax to SMTP" / "SMTP to Fax" converters included with e-Messaging Server. This is how they work:

- If you are receiving a fax, MailGate/PostMan creates a standard SMTP message. The actual fax is attached as a GIF, PCX, or TIF file to the message, and is sent as an email to the configured email address ( eg. joedoe@company.com ) of a user in your company.
- If you are sending a fax, the client software sends a fax as an email to MailGate/PostMan. MailGate/PostMan then converts the email into a fax and passes it off to the David Service Layer for transmission.

**PLEASE NOTE:** Without a **DID** line from your phone company and an appropriate fax board, you will **NOT** be able to configure FaxWare e-Messaging Server to automatically route incoming faxes to the appropriate recipients! Instead, one user in your company, for instance a receptionist, will receive all incoming faxes by default and can then forward them to the appropriate recipient. This is done as part of the MailGate setup, in Flowchart #3, in the "Not Distributed" field.

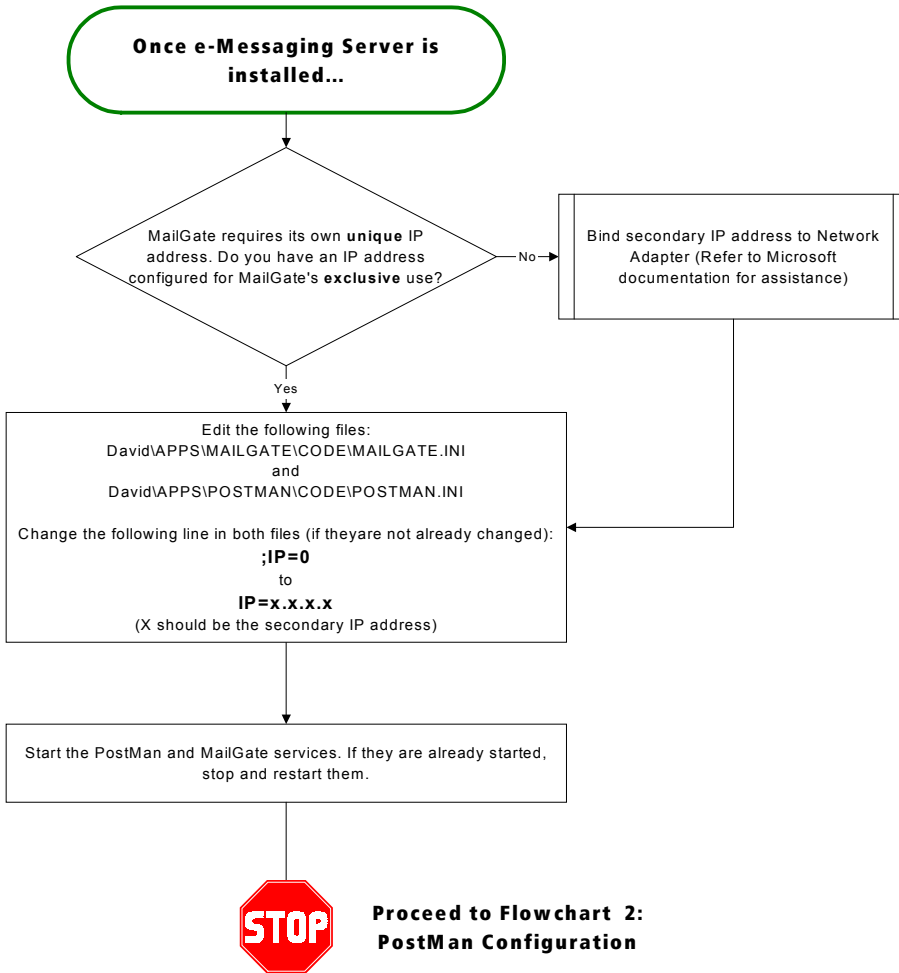
### Important - Before proceeding with the flowcharts

Ensure all previous e-Messaging Server installation steps have been carried out. Print out this guide, as the flowchart details may not show up fully on your monitor!

- If your e-Messaging Server installation resides on the SAME server as your mail system, please start with Flowchart 1 (IP Addressing).
- If your e-Messaging Server installation resides on a DIFFERENT server than your mail system, start with Flowchart 2 (PostMan Configuration).

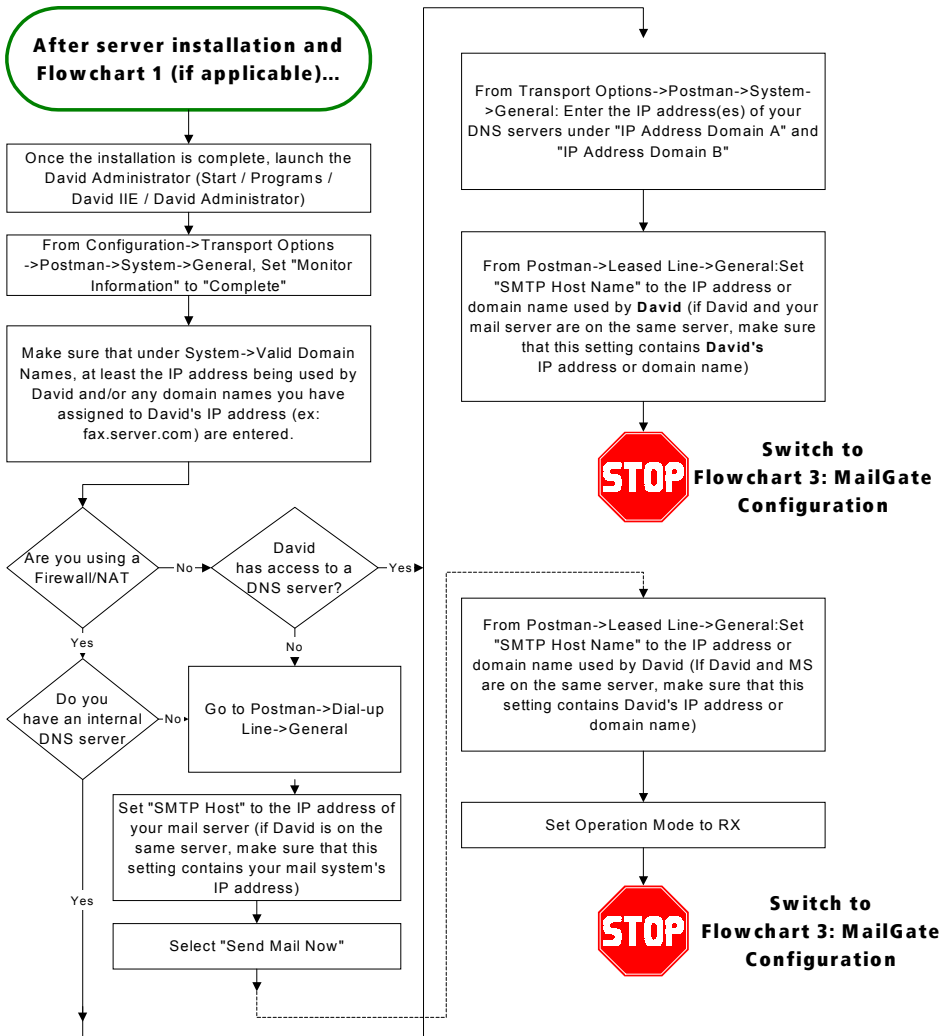
# Email Integration Flowchart 1

## IP Addressing



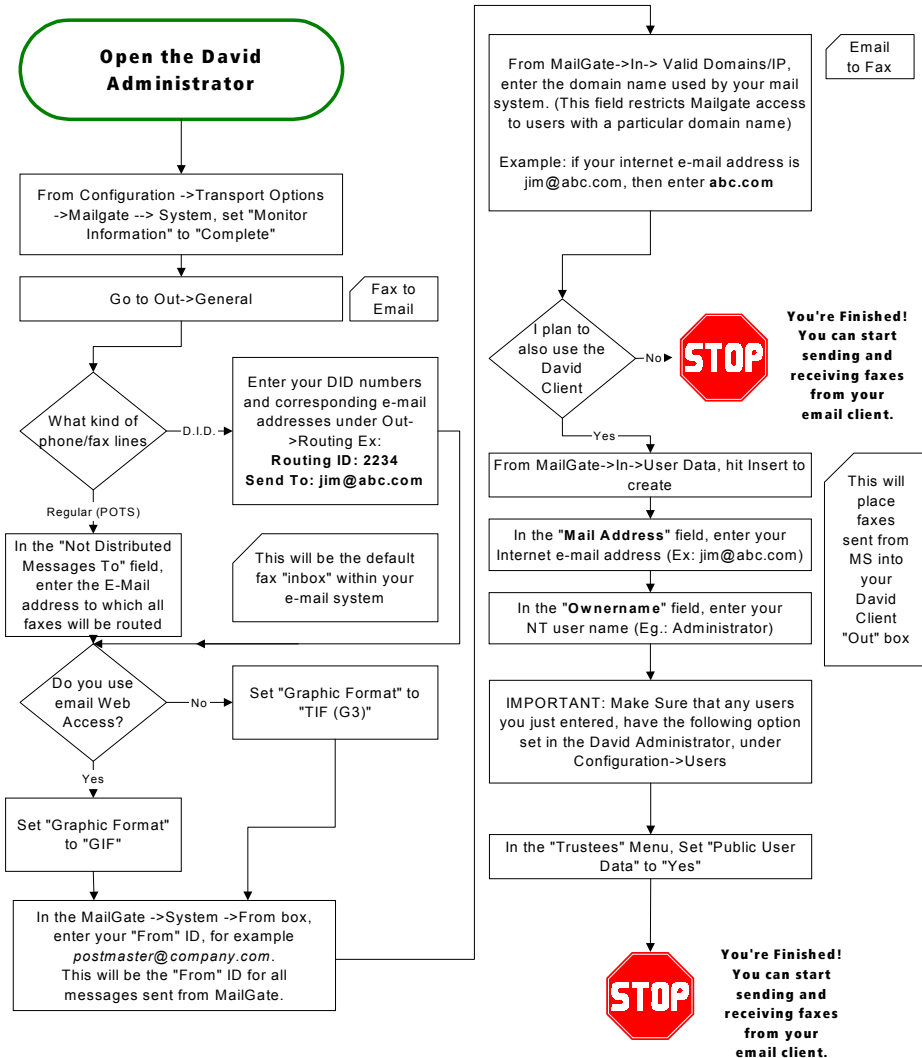
# Email Integration Flowchart 2

## PostMan Configuration



# Email Integration Flowchart 3

## MailGate Configuration



## Step 7 - Setting up the Client Workstations

Now that all the server-side setup is finally complete, your final step is configuring the client workstations. The first section assumes your end-users will be faxing with Outlook2000 and Office2000. The second section deals with configuring faxing from other email clients. Please follow the section that fits your workstation requirements.

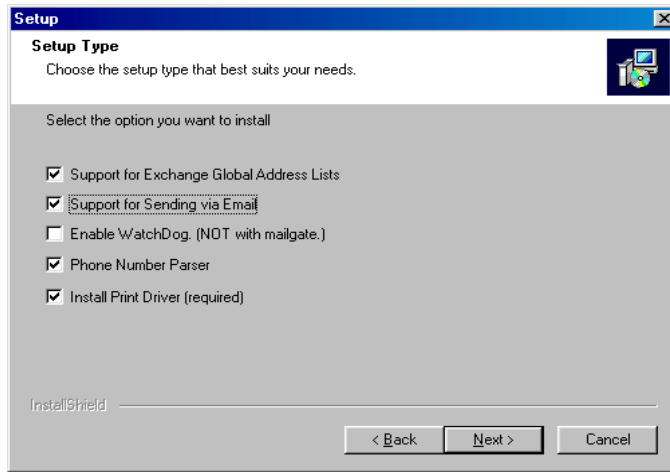
### Section 7.1 - Installing ActivFax

- This application runs under Office 2000 ONLY. The required components are Word 2000 and Outlook 2000. This product will NOT work with Office97, or Outlook97/98.
- If you will be configuring ActivFax for "Support with MS Exchange", you MUST have "Collaboration Data Objects" installed on the workstation. This is installed through the Office2000 Setup program, under Outlook's options.
- The Tobit Fax-Image printer driver will be installed automatically. (See Section 7.2 below for more information about the Fax-Image printer driver works.)
- Tobit ActivFax is installed into Outlook as a "COM Add-In". It can be turned off at any time within Outlook, under Tools / Options / Other / Advanced / COM Add-Ins / "TOFI".
- In some workstation environments, shutting down Outlook2000 manually (ie. not automatically as with a system shutdown) will cause ActivFax to be disabled the next time Outlook is started. This is a known error and will be addressed in future releases. To re-enable ActivFax in this case, go to Tools / Options / Other / Advanced / COM Add-Ins / "TOFI" within Outlook, and re-enable "TOFI". The "New Fax" button should then appear within Outlook.

### ActivFax Installation:

- Copy the file `\ACTIVFAX\ACTIVFAX.EXE` from the CD to a shared network drive.
- Run `ACTIVFAX.EXE` on the client workstation from the network drive. Ensure all Office applications are closed before doing the installation!
- Select "Custom Install". Select the components listed in the screen shot below ("Support for Exchange Global Address Lists" should only be selected if you are running Exchange Server and want this option).

## ActivFax Installation:



- Accept the default installation location.
- Select the path to the DAVID folder on your e-Messaging Server. This can be either a mapped drive or a UNC path.
- Enter your local area code - this is important! Also enter an "extended" area code if applicable to your region (ie. area codes that are not long-distance from yours but must be dialed). For example, in Montreal the local area code is 514, however, some Montreal suburbs have a 450 area code and do not require a "1" to be dialed before the area code.
- Email Support: Accept the defaults for the first two lines. For the last line, "Server", enter your e-Messaging Server's IP address.
- Review your selections and click "Next" to run the installation.
- When it prompts you to reboot, select "Yes" to do so if you are running Windows95/98.

**PLEASE NOTE:** if you are running windowsnt/2000, do not reboot! Select no to avoid rebooting.

- Next time you open Outlook or another Office2000 application, you will see a "New Fax" button on the toolbar. The interface is simple and intuitive, and online help is available at any time by pressing [ F1 ] while you're in the "New Fax" window. Included in the online help is a step-by-step user guide on how to fax from Outlook, Word, etc. and using features such as cover pages and fax broadcasting.

## Section 7.2 - Faxing from Other Email Clients

Once the MailGate/PostMan configuration flowcharts have been followed, you can send a fax from any email client you wish! The "fax" is actually an email that is addressed to PostMan's IP address/domain name. Once PostMan receives the email, it "converts" it to a fax by stripping out the embedded commands, and passes it on to the Service Layer for transmission.

From your email client, you must address your "fax" using the following nomenclature. The host is the domain name or IP address of e-Messaging Server:

FAX.5551234@fax.company.com      or      FAX.5551234@200.100.50.5

- "FAX." is the portion of the address that PostMan recognizes as a job that must be "converted" to a fax.
- "5551234" is the fax number you wish to send the fax to. The number you enter here will be the exact number the fax is sent to; therefore, if you are sending a long-distance fax, you must enter all applicable country and area codes. (Eg.: 15143929120).
- "fax.company.com" is the domain name/IP address of your FaxWare e-Messaging Server. If you do not send the email to the e-Messaging Server or if PostMan/MailGate are not set up properly, the modules will not be able to recognize and process the email and convert it into a fax for sending out by the Service Layer!

**PLEASE NOTE:** You cannot "attach" a document to your fax like you would with a regular email. If you wish to fax something other than straight text, you will need to open the document in the appropriate application (eg. Word) and then print to the **Tobit Fax-Image Printer Driver**. Virtually any Windows application you can print from, you can send a fax from!

Printing to the Tobit Fax-Image printer driver will automatically:

- Render an image of the document you wish to fax, into PCX graphic format
- Make a MAPI call to your default email client, popping up a New Message window
- Add the PCX image to the email as an attachment

## Installing the Tobit Fax-Image Printer Driver:

- Copy the executable file from your CD, \ACTIVFAX\FAXIMAGE.EXE, to a network drive.
- On the workstation, run FAXIMAGE.EXE from the network drive.
- The Fax-Image printer driver will be installed automatically. Depending on your workstation's current configuration, you may receive a message that the UNIDRV.DLL system file has been overwritten with a newer version. You should accept this message and reboot the system if prompted.
- The Fax-Image printer driver is automatically configured as the default Windows printer - if you prefer to have another printer as the default, you can change this once the installation is complete.

### You are now done setting up the client workstations!

If you've checked off all the boxes on your FaxWare e-Messaging Server Installation and Configuration Checklist, congratulations! You have now completed all steps necessary to get your FaxWare e-Messaging Server system up and running, and to have your users start faxing directly from the desktop!

Customizing your e-Messaging Server system from this point onwards is easy -- consult the on-line help ([F1] key at any of the David Admin screens, or within the Tobit InfoCenter client) for more details on the options available within each menu. You can also check our website, **[www.tobitsoftware.com/support](http://www.tobitsoftware.com/support)**, for FAQ's and step-by-step How-To's on a variety of topics such as creating a customized cover page, importing address books from other programs, and so on.

## TECHNICAL SUPPORT INFORMATION

Your purchase of this FaxWare e-Messaging Server bundle entitles you to 90 days of free technical support or 3 incidents, with Tobit Software North America. We also have a variety of pre-paid support packages available once your period of free support has expired. Please reference our website or the Thank-You letter included with your FaxWare e-Messaging Server bundle for more information.

Tobit Software North America's Technical support department can be reached at:

Phone: (514) 392.1303  
Fax: (514) 392.9120  
Email: [support@tobitsoftware.com](mailto:support@tobitsoftware.com)  
Web: [www.tobitsoftware.com/support](http://www.tobitsoftware.com/support)