FaxWare®

e-Messaging Server Installation and Configuration Guide

Novell NetWare

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! FaxWare e-Messaging Server can run under NetWare 4.x, 5.x, and NetWare for Small Business (NWSB). Installations of FaxWare e-Messaging Server on SFT III versions of NetWare are not support.

Before installing FaxWare e-Messaging Server

- Ensure you're using the latest file versions and have applied the latest NetWare Service Pack.
- Ensure you have loaded and configured the AIOCOMX driver properly.

System Requirements

Server Memory: At least 2MB more memory than recommended as standard by Novell. For each additional communication port (Transport Layer Driver) that has been installed, you should allow about 500 KB of memory. When using NetWare 4.x, your server should have at least 12MB memory.

Server Hard Drive: At least 100 MB of free space on the volume FaxWare e-Messaging Server will be installed to (default = SYS). If your fax traffic is very high, you should allow for more free space. On the average, you should allow 50 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

FaxWare e-Messaging Server must be installed via a Windows workstation connected to the target server. This workstation 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 the root administrator. This is important since the installation will create four NDS objects and requires sufficient rights to do so. Using an account with security equal to the root admin will usually work, but for best results we always recommend using the root administrator account for this purpose.

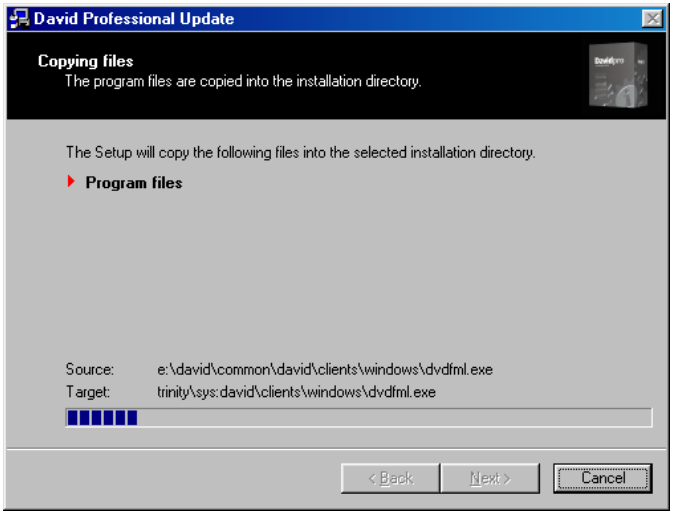
- Insert the FaxWare e-Messaging Server CD. If you have Auto-Insert Notification enabled, the setup program will begin automatically. Otherwise, run `SETUP.EXE` from the root directory of the CD.

- 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.



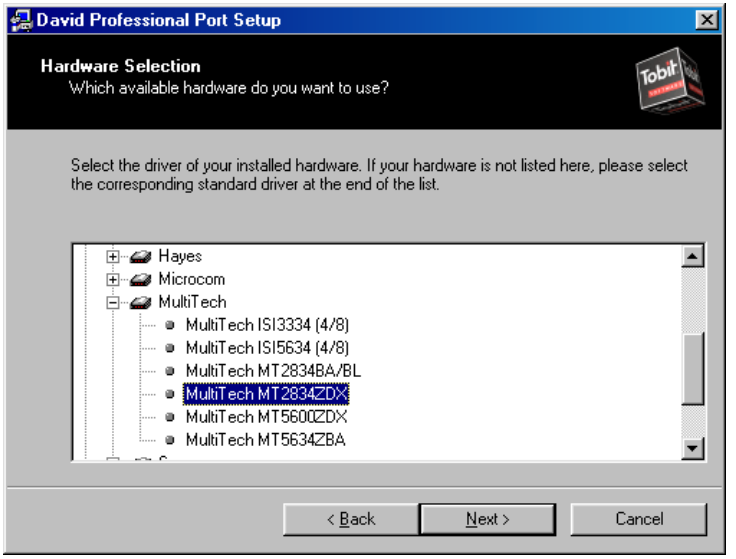
STEP 2 - SETTING UP THE MODEM PORT

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" SMTP 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, run the "Port Setup" utility from the server using the file `SYS:\DAVID\INSTALL\SETUP.EXE`.

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

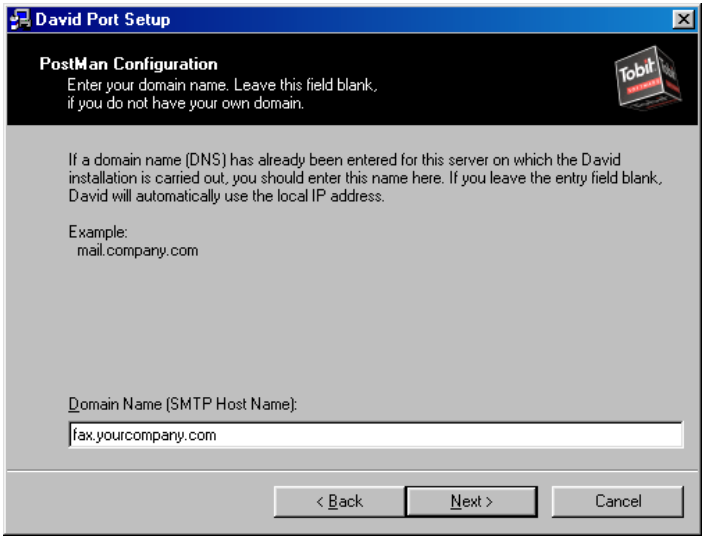


- Select the appropriate Multi-Tech modem that came with your e-Messaging Server bundle.
- Enter the port description (eg. Port 1 Outgoing) and CSID for this line.
- Choose "Selection at Server" for the next option.
- Enter the requested information at the next screen and select "Finish" to complete the port setup. To set up more 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 run the Port Setup utility as mentioned above).

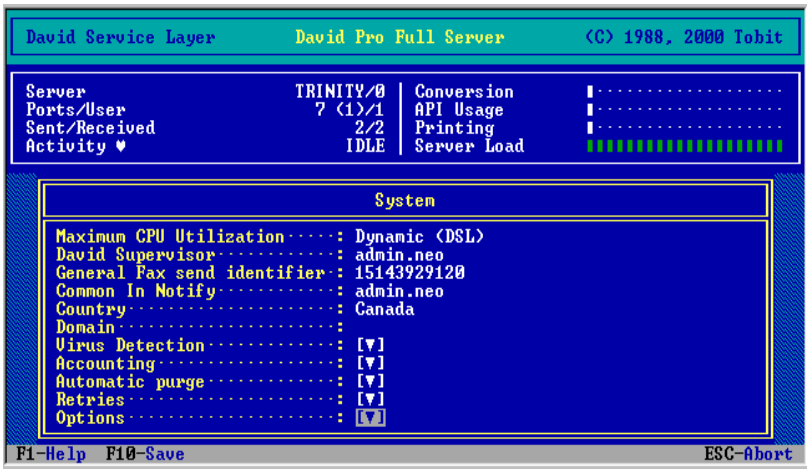
- Select "Email" as the port type and then "David PostMan" as the service.
- Follow the prompts and read the on-screen information carefully.
- At the following screen, enter the domain name you have configured in your DNS for FaxWare e-Messaging Server. It is not required, however, to make an entry in your DNS for FaxWare e-Messaging Server - 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 SERVICE LAYER

On the server, type DVSTART at the system console to load all FaxWare modules and ports.
In the Service Layer module, select Configuration / System from the main menu.

- Enter your main CSID in "General Fax send identifier".
- For "Common In Notify", enter the user that will receive notification of faxes received in the "Common In" box.
- Set "Maximum CPU Utilization" to "Dynamic (DSL)" as in the screen shot below.
- **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.

STEP 5 - ADDING AND CONFIGURING USERS

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

- In the Service Layer, select Configuration / Users from the main menu.

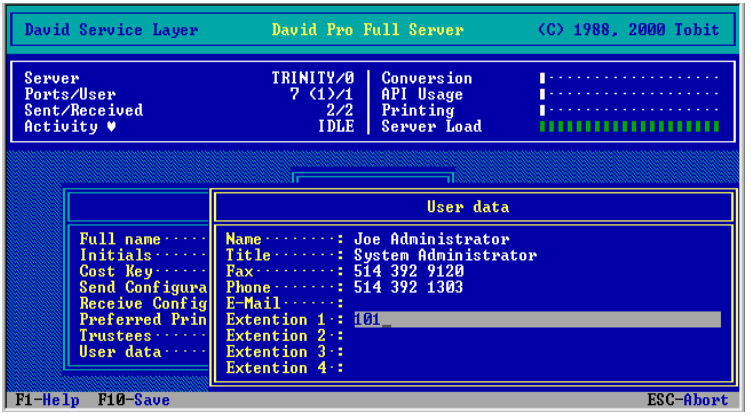
- Press `[Ins]` to add a user. A listing of all NDS user objects will appear; select the user object you wish to add to FaxWare.

- Highlight the user you just added and press `[Enter]` to edit the properties.

- 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.)



- Press `[F10]` to save all changes for the user. Add all other users as per the above procedure.

STEP 6 - CONFIGURING EMAIL INTEGRATION

Now that the modem is set up, the Service Layer is configured and the users have been added and configured, 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 FaxWare 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

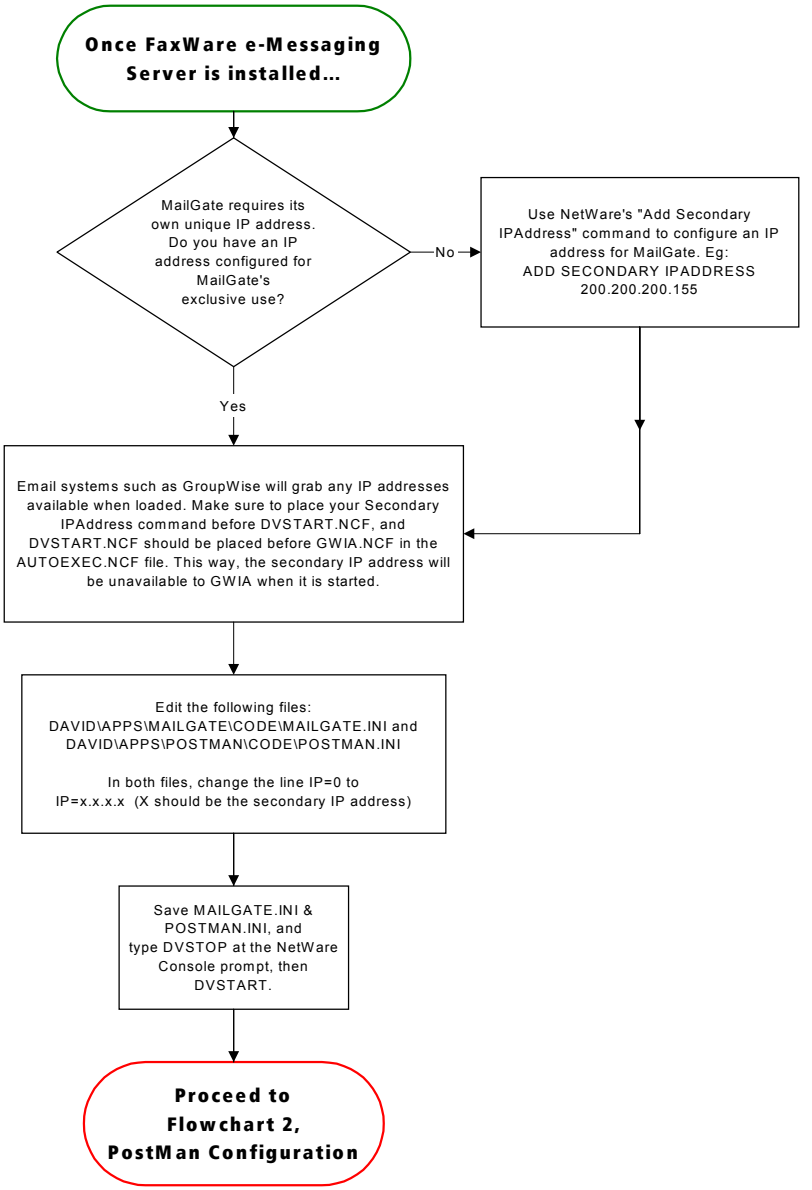
- Ensure all previous e-Messaging Server installation steps have been carried out. Print out this guide, as the flowchart details may not show up fully on your monitor!

- 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).

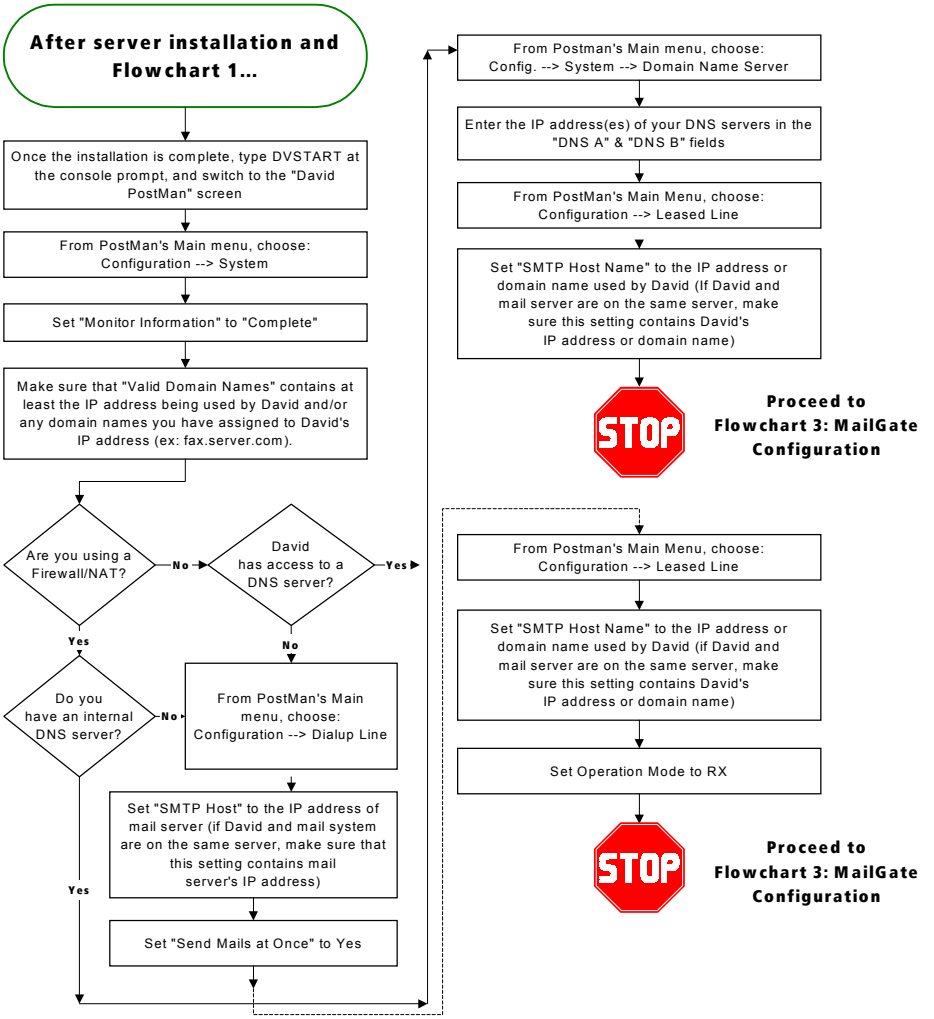
EMAIL INTEGRATION FLOWCHART 1

IP ADDRESSING



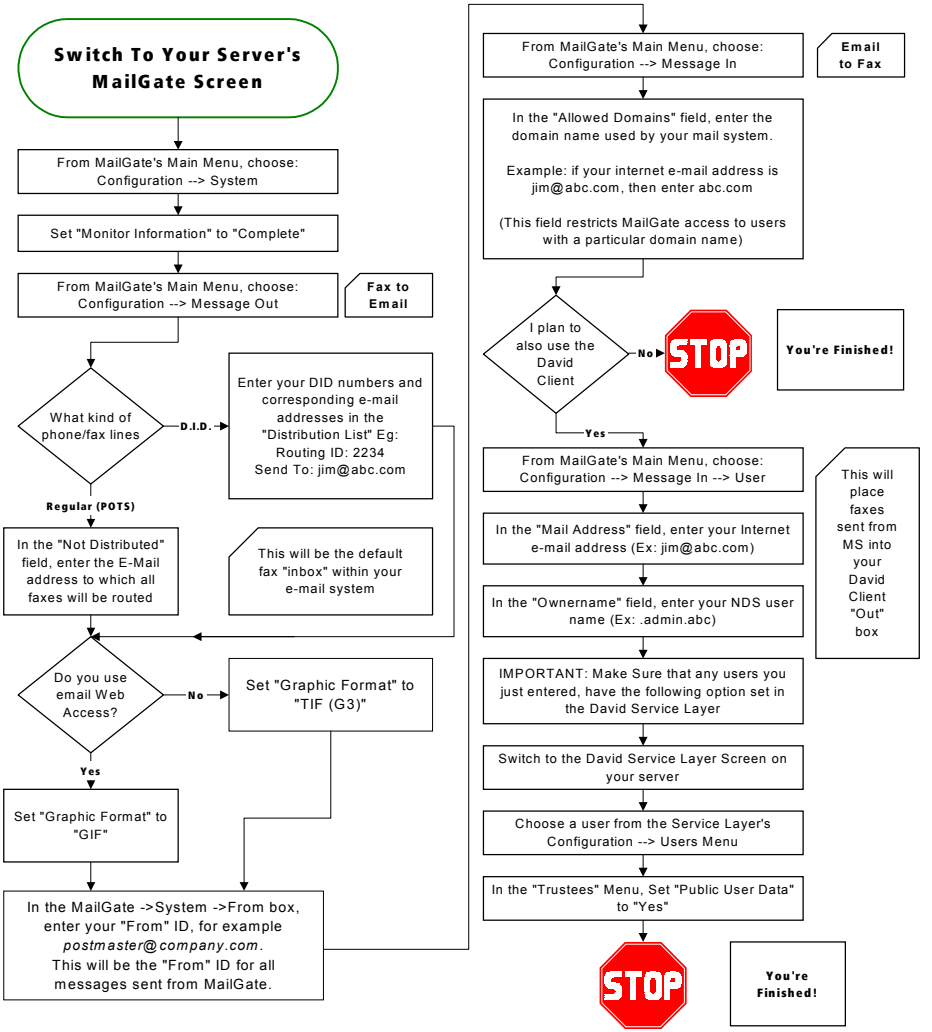
EMAIL INTEGRATION FLOWCHART 2

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.

- The Fax-Image Print Driver (see section 7.2 below) is automatically installed during the ActivFax installation, and will not need to be installed manually.

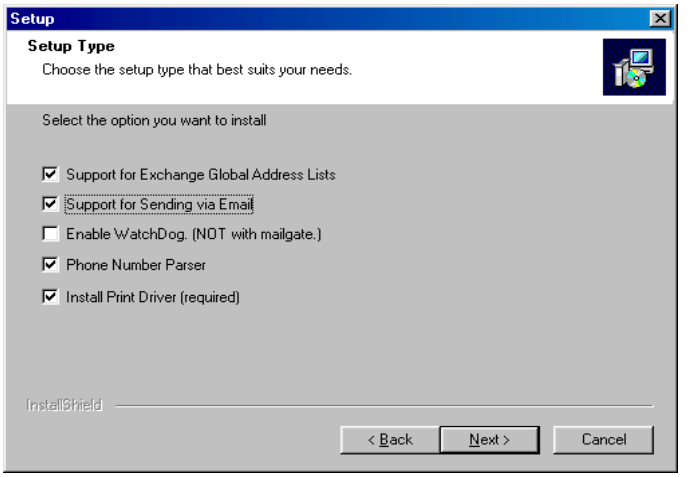
ActivFax Installation

- 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 (continued)



- Accept the default installation location.
- Select the path to the DAVID folder on your FaxWare 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 FaxWare 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 Windows NT/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 PostMan:

`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 FaxWare 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 FaxWare e-Messaging Server system from this point onwards is easy; consult the on-line help `([F1]` key at any of the David server 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**, for FAQ's and step-by-step How-To's for a variety of issues such as making a customized cover page, importing address books from other programs, and so on.

TECHNICAL SUPPORT INFORMATION

Your purchase of the 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
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Email: support@tobitsoftware.com
Web: www.tobitsoftware.com/support